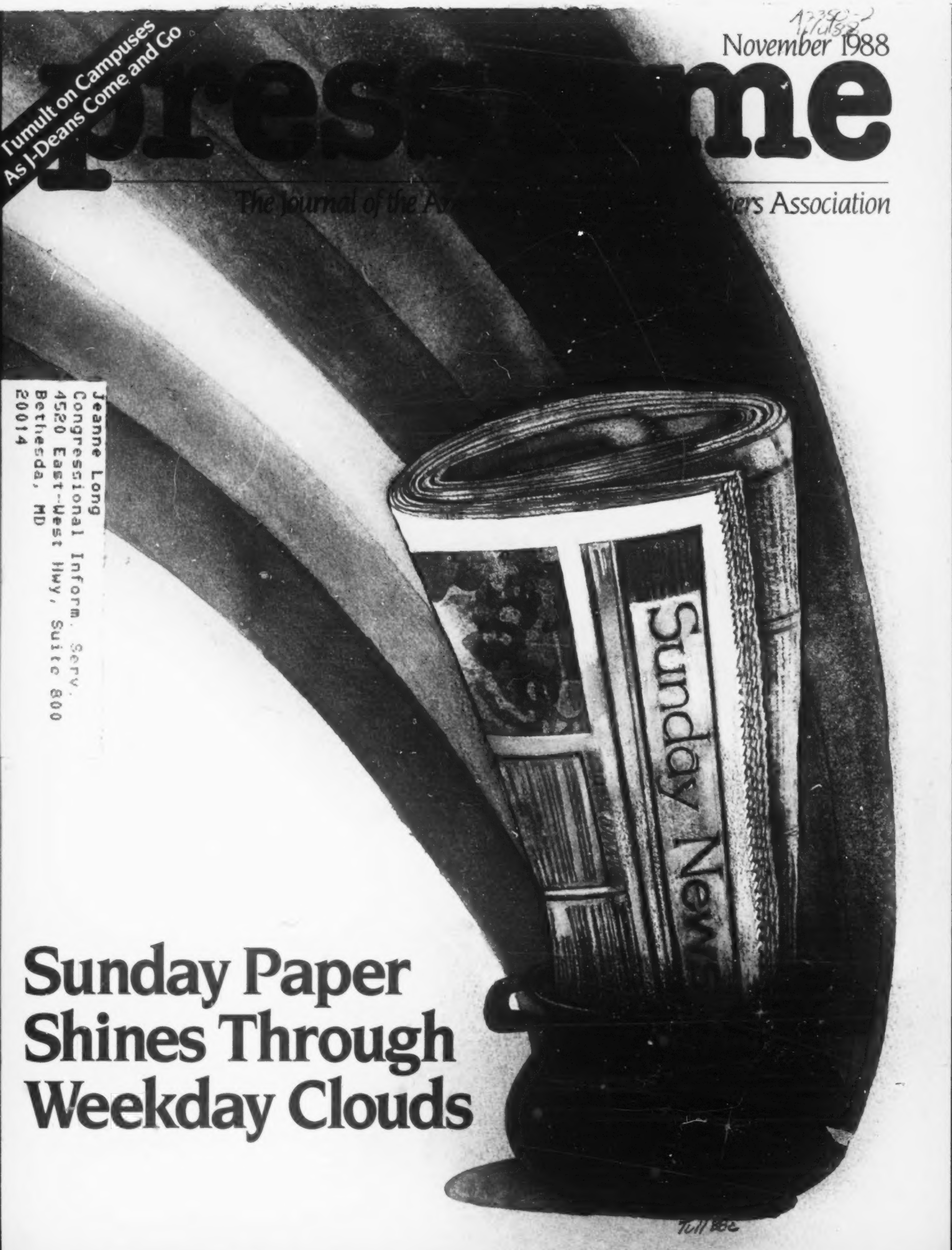
17350-2

November 1988

pres me

The Journal of the A ers Association

Tumult on Campuses
As J-Deans Come and Go



Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

Sunday Paper Shines Through Weekday Clouds

presstime

VOLUME 10, NUMBER 11 NOVEMBER 1988

INDEX

Special Report *Amid the lackluster performance of daily newspapers, the Sunday edition glitters. But it is not pure gold. Even though weekday circulation growth has ground almost to a halt, Sunday circulation has continued upward—although at a lesser rate than the increase in population and households. Advertisers are shifting more and more of their business to the Sunday edition, and even demand that some newspapers start Sunday papers. Newspaper executives try to understand the ramifications of Sunday's success story, but answers don't come easily.* **28**

Wanted: J-school deans *Benefits include prestige, influence, challenge. Must tolerate headaches. Inquire at 10 percent of U.S. journalism schools.* **6**

On the press freedom battlefront *Seven organizations rally to the cause wherever a free press comes under attack in the world.* **12**

Naughty Neighbors *News organizations in the Americas often are under fire from governments, despite a few encouraging developments.* **16**

Rack and ruin *Newsracks are favorite targets for vandals, costing local newspapers up to $100,000 a year to repair.* **18**

Ink Disposal *Vendors are developing ink recycling systems that will pay for themselves while helping newspapers to be good environmental citizens.* **24**

Paring the rank-and-file *Technology has phased thousands of newspaper jobs out of existence. Pagination is bringing another, smaller wave of attrition.* **36**

Profile: Susan Miller *Scripps Howard's editorial director overcame obstacles to break into newspapering. Now she helps newspapers overcome theirs.* **40**

Essay: Fraud prevention *Newspapers can help curb fraudulent advertising by taking preventive steps, says Lawrence F. Murphy of The New York Times.* **42**

Waste not, tax not *State governments are getting the newspaper industry's attention with taxation schemes to promote recycling.* **48**

Tale of two cities *Dailies in small California and Ohio communities have discovered how to stay successful, despite their diverse and changing markets.* **60**

Preprint predicament *If newspapers cannot enlarge and modernize their mailrooms, insert advertisers say they'll take their business elsewhere.* **70**

Journalism Deans, p. 6

Sunday News

Sunday Newspapers, p. 28
(Cover art by Bobbi Tull.)

MILWAUKEE SENTINEL
THE MILWAUKEE JOURNAL

Newsrack Repairs, p. 18

Advertising	51
ANPA calendar	81
ANPA news	82
Chairman's corner	4
Circulation	60
Education	53
Employee relations	64
Government affairs	44
Letters	82
News-editorial	50
Newspaper business	78
Newsprint	58
Overset	84
Research	57
'Shoe'	58
Speeches	77
State and local	48
Syndicates	56
Technology	70
Telecommunications	54
Training	58

CHAIRMAN'S CORNER

ANPA adjusts 1989 program to focus on members' priorities

ANPA's officers, directors and staff are currently planning your Association's programs and budget for 1989. They are drawing heavily on the advice and guidance expressed by newspaper executives from across North America who responded to this spring's membership survey. The task is formidable because of the many useful suggestions received from the nearly 2,300 executives—representing all newspaper departments—who responded.

A quick review would highlight the following: You told us ANPA has improved its service to you and continues to improve. Members noted that we were generally on the right track, with a good staff and efficient operation. You reiterated that ANPA should help on short-term problems, while at the same time giving major attention to the longer-range needs and challenges facing our business.

Arthur Ochs Sulzberger

Members were particularly pleased by **presstime**, which was started a decade ago when our last membership survey indicated a major communication gap.

What happens now and how does ANPA listen to and act on your views and priorities? Here are some examples:

Executives throughout our survey rated circulation, readership, penetration and editorial-excellence matters as top priority. Therefore, we will be retargeting ANPA programs and staff resources to provide additional help on these vital concerns.

You told us of your growing concern about literacy, and the lack thereof, so we will be adding further ANPA resources to the ongoing ANPA Foundation work on this.

Meanwhile, of course, we noted your continued concern about competition from other media, operating costs, new production methods, human resources and, regulation from federal, state and local governments.

I can assure you that ANPA will continue, as it has in the past, to monitor, inform and, where necessary, take the lead in representing America's newspapers in the marketplace.

We are a diverse industry, each in our own way serving our readers and advertisers. What the survey shows is that through our membership in ANPA and under its umbrella, we are stronger in our unity than each standing alone. And this is good for a free press and a free society.

Thank you for your help.

Arthur Ochs Sulzberger
ANPA Chairman

ANPA
presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Linda C. Shanks
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Shirley Schainblatt
Editorial Assistant, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041;
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 1140 Avenue of the Americas, New York, N.Y. 10036; (212) 391-2155
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601; (312) 977-1933
Southeast
Ned Quenzer and Bob Stites, Quenzer/Stites Inc., 3552 Habersham at Northlake, Tucker, Ga. 30084; (404) 491-1419
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067; (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
Katherine Fanning, The Christian Science Monitor, Boston
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1988 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA **Presstime** is a member of the Business Publications Audit of Circulation Inc.

Consumption decline reaches 6 months

Newsprint consumption by U.S. daily newspapers decreased 3.2 percent in September, the sixth straight month of declining consumption compared with year-earlier months. For the first nine months of the year, consumption by U.S. dailies was down 0.04 percent.

Consumption by all U.S. users totaled 1,021,721 metric tons in September, a decrease of 2.7 percent from September 1987. However, there was a 0.4-percent increase for the nine-month period.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a 46-day supply in September, up from 42 days a year earlier.

September's shipments from Canadian mills were 1.2-percent higher than in September 1987. Canadian shipments to the United States increased 0.6 percent, and those overseas were up 0.5 percent.

Canadian mills operated at 96 percent of rated capacity in September and 99 percent year-to-date. Figures for U.S. mills were 98.2 and 97.9 percent, respectively.

Estimated consumption of all U.S. daily newspapers[1]

Region	**August 1988(r)**	**August 1987**	**% Change**
Northeast	185,395	196,589	-5.7
North Central	160,233	164,020	-2.3
South	232,736	237,176	-1.9
West	161,971	173,634	-6.7
Circulation Size			
up to 25,000	58,976	60,290	-2.2
25,001-100,000	162,863	162,384	+0.3
Over 100,000	518,496	548,745	-5.5
August totals	740,335	771,419	-4.0
Eight-month totals	6,066,680	6,044,760	+0.4
Region	**September 1988(p)**	**September 1987**	**% Change**
Northeast	188,054	197,142	-4.6
North Central	162,143	166,708	-2.7
South	237,346	237,313	+0.01
West	164,881	175,894	-6.3
Circulation Size			
up to 25,000	58,520	61,141	-4.3
25,001-100,000	165,205	161,504	+2.3
Over 100,000	528,699	554,412	-4.6
September totals	752,424	777,057	-3.2
Nine-month totals	6,819,104	6,821,817	-0.04

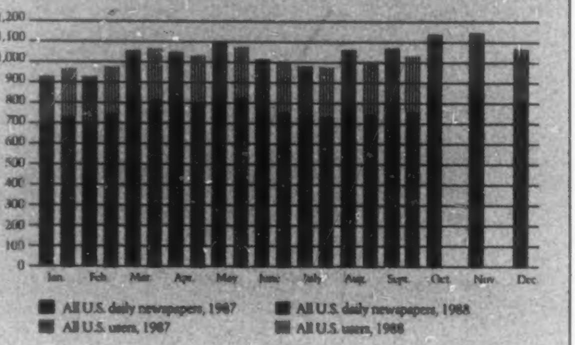
Estimated consumption of all U.S. users

	1988	**1987**	**% Change**
July totals	967,960(r)	967,075	+0.1(r)
August totals	999,681(r)	1,040,896	-4.0(r)
September totals	1,021,721(p)	1,050,338	-2.7(p)
Nine-month totals	9,049,101(p)	9,009,532	+0.4(p)

Production

	Canada	**U.S.A.**	**North America**
September 1988	789,600	446,260	1,235,860
September 1987	796,750	448,187	1,244,937
Decrease	-7,150	-1,927	-9,077
	-0.9%	-0.4%	-0.7%
Nine months 1988	7,457,742	4,054,580	11,512,322
Nine months 1987	7,250,839	3,948,348	11,199,187
Increase	+206,903	+106,232	+313,135
	+2.9%	+2.7%	+2.8%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	**Tonnage**	**Days' supply on hand**	**Days' supply in transit**
July 1988	972,566	45	6
July 1987	931,330	39	6
August 1988	1,006,598	44(r)	5
August 1987	904,565	37	6
September 1988	1,005,930	41(p)	5(p)
September 1987	929,084	36	6
Canadian mills			
September 1988	301,322	—	—
September 1987	270,795	—	—
U.S. mills			
September 1988	66,577	—	—
September 1987	42,476	—	—

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
September 1988	609,684	102,408	117,893	829,985
September 1987	631,262	102,630	118,177	852,069
Nine months 1988	5,305,673	908,295	1,131,547	7,345,515
Nine months 1987	5,273,382	857,719	1,126,147	7,257,248
Increase	+32,291	+50,576	+5,400	+88,267
	+0.6%	+5.9%	+0.5%	+1.2%
From U.S. mills				
September 1988	411,266		35,555	446,821
September 1987	434,618		16,684	451,302
Nine months 1988	3,761,357		262,777	4,024,134
Nine months 1987	3,735,346		219,600	3,954,946
Increase	+26,011		+43,177	+69,188
	+0.7%		+19.7%	+1.7%
From North American mills				
September 1988	1,020,950	102,408	153,448	1,276,806
September 1987	1,065,880	102,630	134,861	1,303,371
Nine months 1988	9,067,030	908,295	1,394,324	11,369,649
Nine months 1987	9,008,728	857,719	1,345,747	11,212,194
Increase	+58,302	+50,576	+48,577	+157,455
	+0.6%	+5.9%	+3.6%	+1.4%

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.

(r) = revised (p) = preliminary

NOTE

ONLY THE FOLLOWING PAGES OF THIS

PUBLICATION HAVE BEEN FILMED

Cov. 1, Pgs. 3, 4, 30, 32

A3350-2
12/19/88

December 1988

presstime

The Journal of the American Newspaper Publishers Association

Tribune Plus
Psychologist urges ne
attitude about aging
INSIDE
Service Directory / 2
Unretired Retirees / 3
Campaign songwriters make music to vote by

Newspapers Respond as America Ages

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy. Suite 800
Bethesda, MD
20014

presstime

INDEX VOLUME 10, NUMBER 12 DECEMBER 1988

Special Report *Older people are becoming more numerous, more affluent—and more attractive in the eyes of newspapers. All too often, they have been overlooked in the pursuit of high-spending younger adults. Now there are signs that newspapers are losing their grip on these most faithful readers, people 55 and older who make up nearly a third of all readership. Among them, readership has dropped by 9 percent in 20 years—less than the 16-percent loss of overall readership, but a drop that has spurred publishers to find ways to strengthen older readers' loyalty.* **22**

Consider the alternatives *Many "alternative" newspapers have developed a formula that pleases upscale readers.* **6**

The appeal of co-op *Up to $15 billion in co-op advertising will be up for grabs next year. Here's how to get some of it.* **10**

'Tis the season to be tipping *Christmas cheer for newspaper carriers is down because paying by mail is up. But they still are dropping hints.* **14**

Erasable disks *Newspapers are eagerly waiting to apply this emerging technology, which could offer low-cost pagination with high-volume storage capacity.* **18**

Turnover myths debunked *Newsrooms at small dailies fare no worse than most small businesses in their vacancy rates.* **30**

The un-pacific rim *Grant copy editors their discontent and idiosyncracies, says a veteran editor. They are unsung, if cranky, heroes.* **34**

Profile: Harold Hoyte *The founder of Barbados' largest newspapers has raised journalistic standards throughout the Caribbean.* **36**

Essay: Ponderous pages *Candidates may be mushy on the issues, but they have more fortitude than do editorial writers, Richard L. Connor says.* **38**

Journalism fellowships flourish *Stipends continue to rise for the most popular mid-career opportunities. Dozens are listed in this annual roundup.* **48**

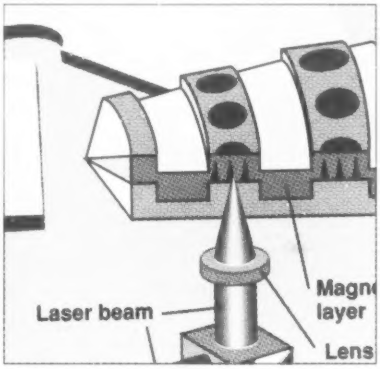
New tax requirements *A non-discriminatory benefits provision of the tax code takes effect Jan. 1. The full impact on newspapers is yet unknown.* **56**

Fires rekindle concerns *Recent fires temporarily crippled three metropolitan newspapers and caused re-examination of safety policy.* **66**

CityPa
Full of Hot Air

"Alternative" Press, p. 6

Reaching Older Readers, p. 22
(Cover photo by Taran Z.)



Optical Disks, p. 18

Advertising	44
ANPA calendar	70
ANPA news	69
Books	69
Chairman's corner	4
Circulation	46
Education	55
Employee relations	56
Government affairs	40
Letters	71
News-editorial	48
Newspaper business	66
Newsprint	64
Overset	72
Postal affairs	45
Research	41
Speeches	65
Syndicates	54
Technology	60
Telecommunications	42
World press	63

CHAIRMAN'S CORNER

Readership, market problems dictate coordinated response

There is nothing like a little pain to focus a publisher's attention. And focused we are, for costs are up, advertising linage is down, market penetration is off, and too many future readers (if one listens to the portenders of doom) are either illiterate, lazy or both.

Examined in isolation, it would seem that many of what were once considered "hometown values" are undergoing rapid change. And too often they seem to be at our expense. Just look:

The local department store is part of some leveraged buyout, thus affecting our advertising. Women's skirts are either too long or too short, so there goes more linage. Major S&Ls are running out of money, while, at the same time, $20-billion doesn't seem too much to offer for a cookie and cream cheese company.

The Japanese, who already "own" Hawaii, continue to acquire the rest of America while the United States has become the leading debtor nation. It all adds up to lousy business.

Fortunately, our competitors are also affected by change. The growth of cable TV, for instance, with the concurrent opportunity for the viewer to flip through 60 channels, is creating problems not only for the local TV operator but for the networks as well. And the proliferation of the 15-second commercial causes a mental fermentation that blends one ad with another. One has to be careful these days not to pour detergent into the dogfood.

Arthur Ochs Sulzberger

Direct mail has its problems also. Like clutter on the television set, it creates clutter in the mailbox. Just order one item from a catalog and then go away for a few days and see what happens. The fact is catalogs reproduce in the dark environment of a mailbox, a hitherto unknown scientific fact.

Seriously and fortunately, we have both the time and the strength as an industry to create sensible solutions to our problems.

Your ANPA Board of Directors is keenly aware of the high priority given by the members to readership and market problems. At a recent meeting of the directors of the Newspaper Advertising Bureau, these concerns were re-emphasized. It was determined that there would shortly be a small meeting of the officers of these two organizations to coordinate efforts and work for the common good.

Each year the newspaper industry spends a considerable amount of money funding a wide range of related organizations—from ANPA and NAB to smaller, more specialized groups like ANCAM and INAME or regional associations like Inland or SNPA. It would seem important this year that we make a real effort to keep all of these organizations rowing in the same direction. After all, they are taking the trip at your expense.

To help provide the focus we need to address today's challenges, ANPA along with NAB will take the first steps in this cooperative approach. It is my belief that together we have a good shot at identifying and solving our problems and that with the help of our sister organizations we can marshal both the funds and the talent to use the current economic pain as an incentive to build for a strong tomorrow.

Arthur Ochs Sulzberger, ANPA Chairman

ANPA
presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Linda C. Shanks
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Shirley Schainblatt
Editorial Assistant, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041,
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 1140 Avenue of the Americas, New York, N.Y. 10036; (212) 391-2155
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601; (312) 977-1933
Southeast
Ned Quenzer and Bob Stites, Quenzer/Stites Inc., 3552 Habersham at Northlake, Tucker, Ga. 30084; (404) 491-1419
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067; (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
Katherine Fanning, The Christian Science Monitor, Boston
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1988 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA Presstime is a member of the Business Publications Audit of Circulation Inc.

ON PAR WITH SMALL BUSINESSES

The Vacancy Rate

Survey shows small dailies' newsroom churn may not be as bad as popularly believed

BY MARTY THARP

Everybody knows what happens on small dailies. Underpaid, fairly inexperienced journalists come and go, using these newspapers as stepping stones to bigger and better jobs.

A high rate of newsroom vacancies [**presstime**, June 1988, p. 110] has been, is and probably will continue to be a major problem. Right?

Not necessarily.

A new survey, the first national one to concentrate on employee departures at small dailies, contradicts some of the profession's folklore.

The survey shows that in a given year one-fourth of the newspapers' newsroom positions become vacant. This compares with an annual vacancy rate of 17-23 percent for small businesses overall, according to the U.S. Department of Labor's Bureau of Labor Statistics.

BLS breaks vacancies down into two kinds: "turnover," which it defines as leaving a job to go into an entirely different field; and "mobility," leaving a job to take a position at another company in the same field.

The survey found that an average of 11.2 percent of newspaper employees leave the profession altogether in a year's time, whether they quit, retire or are fired. This rate of "turnover" is about the same as that for all small businesses, for the BLS statistical category of "technical-professional employees" and for the media in general.

On the matter of "mobility," the newspaper rate was determined to be 13.8 percent annually. This, too, was in line with BLS data.

Table 1
Annual Vacancies at Small Dailies' Newsrooms

Staff size	Number of newspapers represented	Number of journalists represented	Number who left	Turnover[1]	Mobility[2]
1 to 5	20	118	51 (43%)	18 (15%)	33 (28%)
6 to 10	40	383	124 (32%)	73 (19%)	51 (13%)
11 to 15	24	350	97 (28%)	48 (14%)	49 (14%)
16 to 20	16	260	49 (19%)	31 (12%)	18 (7%)
21 to 2[illegible]	12	272	60 (21%)	27 (10%)	33 (12%)
over 25	6	184	23 (13%)	8 (4%)	15 (8%)

---

[1] Leaving the newspaper business entirely

[2] Going to work for another paper

Table 2
Experience Level of Journalists at Small Dailies

Years as journalist	Number of jobs held				
	1st	2nd	3rd	4th	5th
1 year	88%	9%	2%	0%	0%
1 to 2 years	60%	31%	9%	0%	0%
2 to 3 years	47%	34%	19%	0%	0%
3 to 5 years	41%	30%	22%	5%	3%
5 to 10 years	31%	37%	22%	6%	4%
over 10 years	25%	30%	23%	6%	16%

Tharp, a former newspaper reporter and editor, is assistant professor in the Department of Technical Journalism at Colorado State University. Funding for her study was provided by Gannett Foundation, Buckner News Alliance, Nixon Newspapers, CSU and the University of Colorado.

Newspapers with fewer than five newsroom employees had the highest rate of employee movement. (See Table 1.)

Daily newspapers with circulations of 25,000 or less were chosen for the survey. They make up 66.8 percent of U.S. dailies and serve more than 1,000 communities.

Questionnaires were mailed in January and February of this year to 300 such papers. The top newsroom editor and two working journalists on the staff, including reporters and copy editors, were questioned at each paper. A 45-percent return from the top editors and a 43-percent return from the other staffers provided the data.

Let's look at some of the folklore—and what the survey found:

- *Vacancy rates on small daily newspapers is viewed as a big problem.* Untrue. The editors did not list turnover or mobility as major concerns. Their major worries are competition, availability of resources and understaffing.
- *But I heard of an editor who replaced his entire staff within a year.* Indeed, one newspaper in the study reported a 270-percent change in staff in one year. Anecdotal material like this is startling, but it is definitely the exception. Seventy-four percent of the editors said they replaced, or had

to replace, only one or two employees in the past year.

- *Nobody stays very long at these small daily newspapers.* Untrue. The mean length of time the working journalists said they had spent at their current jobs was 4.9 years. Younger people, those 20 to 25 years old, moved an average of every 1.6 years, but those over 40 remained for 9.3. While nearly half of the working journalists reported they were at their first jobs, 26 percent had been at their jobs for more than five years.
- *Young workers will always be mobile, and they make up the majority of the staff members.* Part untrue. The notion that younger workers are continually job hopping is somewhat overblown. Sixty percent of the respondents who were in their second year as working journalists were still at their first jobs. (See Table 2.)

> *Younger people, those 20 to 25 years old, moved an average of every 1.6 years, but those over 40 remained for 9.3.*

These younger journalists do constitute majorities in the newsrooms, where 57 percent of the journalists are under 30 years of age. Yet 21 percent are from 31 to 40 years old, and 22 percent are over 40. This older group appears to be a solid core of longtime employees who genuinely enjoy their newspapers and their towns.

- *Poor pay is the main source of discontent among working journalists.* Untrue. Although editors thought poor pay was a major disadvantage of their newspapers as a place to work, their staffers complained just as much about overwork, having to put in overtime (often with no additional compensation), and an insufficient number of people to do the job right.

The staffers might easily have listed pay, however, because the survey found entry-level people receiving an average of $243 per week. All of the working journalists combined, no matter how much experience, were paid an average of just $290 weekly. Women earned 12 percent less than men.

The journalists said they work at the small dailies, despite the low salaries, in order to gain experience. Appealing aspects of their jobs included the variety of assignments and the opportunity for personal achievement.

- *Journalists who remain on the newsroom staffs at small dailies are generally satisfied.* True. An extensive portion of the survey measured job satisfaction, and the majority of the working journalists responded that they were satisfied with the nature of their work. The only areas where dissatisfaction outweighed satisfaction were general management of the newspaper and supervisors' attitudes toward workers.

And yet 75 percent of the journalists said they *intend* to leave their jobs within three years, and even more—96 percent—said they believe they made the wrong career choice. Paradoxically, just as many said they find newspaper work highly satisfying—more so than work in any other field.

The highest levels of dissatisfaction are among workers in their mid-to-late 30s, many of whom indicated they feel stuck in their jobs without the opportunity to advance. In some cases, these are workers in two-career households or people with family commitments that restrict possible movement to other locations.

- *It doesn't matter that newsroom staffers leave.* Untrue. Routine news work can be done by inexperienced journalists, but it takes time to develop journalists who know the community, who have cultivated sources and who know where to look for stories. One of the concerns raised by editors was the relative inexperience of some staffers. Even if there is a ready pool of journalism graduates to fill the vacated spaces, it takes time and money to replace employees.

While the study disproves much of the folklore, when even a quarter of the staff leaves, managers have problems. And they may not be able to deal effectively with these problems because few have the management training that could help them.

The study shows that while 70 percent of the editors have more than 10 years' experience as editors, only a third have any management training. Other businesses train managers in the skills that help maintain motivated, contented employees because they know this can help reduce the talent drain. The small dailies studied, whether group-owned or independently owned, are not yet providing much training for those who manage newsroom people.

So the folklore will remain, even though survey results contradict much of it. ☐

NEWSPAPER
WHAT'S IN IT FOR ME?
YOUR COMPLETE GUIDE TO NEWSPAPER CAREERS

Order now!

A four-color booklet showcasing careers in *all* newspaper departments

Perfect for:

- High school and college career counseling
- Career days
- Classroom presentations
- Job fairs
- Newspaper plant tours

Price:

2-50 copies, $2.00 each
51-199 copies, $1.50 each
200 plus copies, $1.00 each
Single copies are free.

Send check payable to:

Newspaper Careers Project
ANPA Foundation
Box 17407 Dulles Airport
Washington, D.C. 20041

Payment must accompany multiple orders.

NOTE

ONLY THE FOLLOWING PAGES OF THIS

PUBLICATION HAVE BEEN FILMED

Cov. 1, Pgs. 2, 5, 59

1/1/89 A2350-2

January 1989

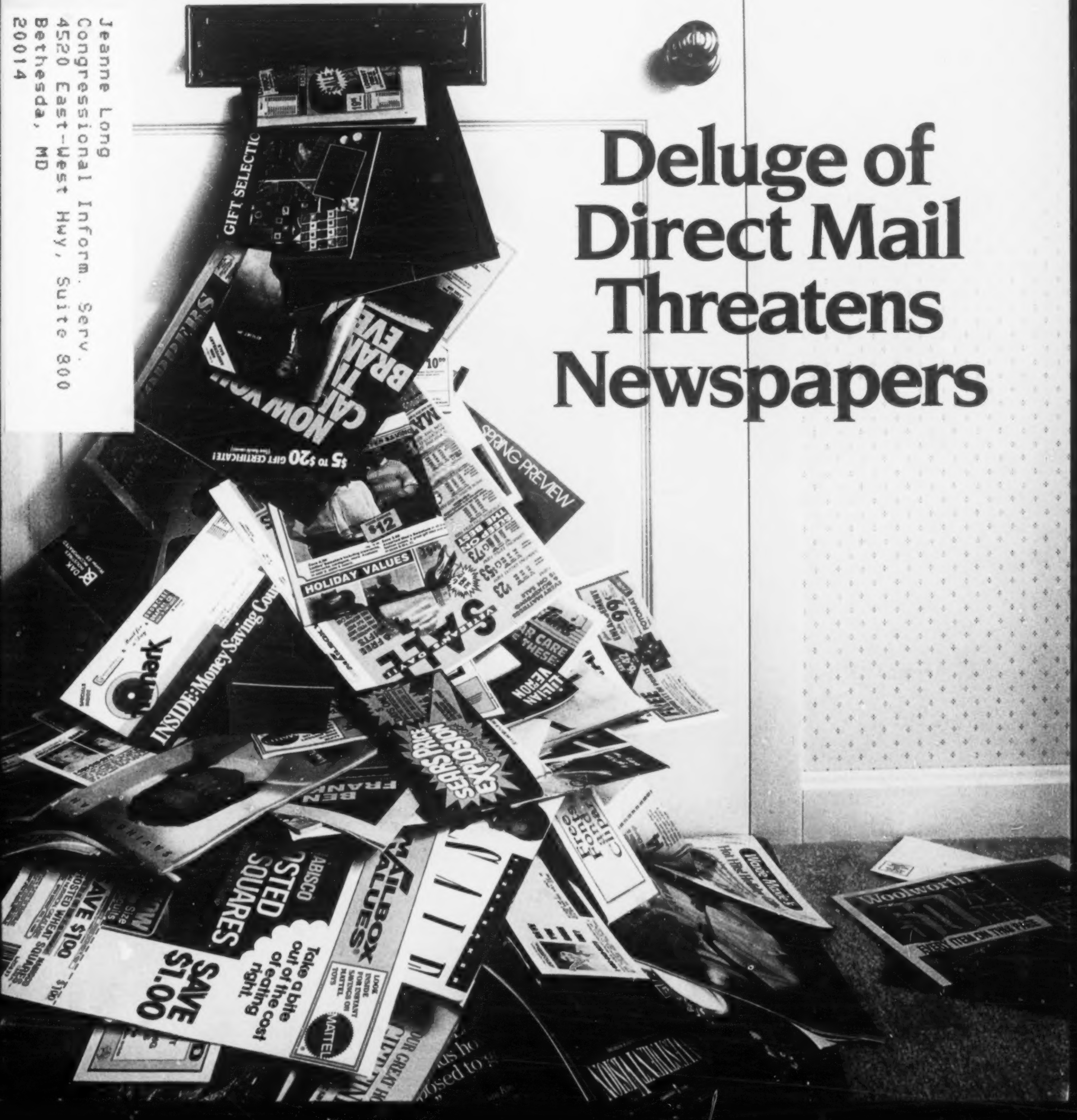
89 Economic Outlook

presstime

The Journal of the American Newspaper Publishers Association

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

Deluge of Direct Mail Threatens Newspapers


GIFT SELECTIONS
$5 TO $20 GIFT CERTIFICATE!
SPRING PREVIEW
HOLIDAY VALUES
INSIDE: Money Saving Cou
SEARS PRICE EXPLOSION
MAILBOX VALUES
SAVE $1.00
Take a bite out of the cost of eating right.
Woolworth

CHAIRMAN'S CORNER

Here's what ANPA will do in the year ahead

Without so much as a "by your leave" the New Year has swept into office, bringing with it continuing confusion for our economy. Not that publishing is more deeply affected than other industries, but publishers are an articulate lot and tend to bemoan their fate with great conviction.

So the New Year is here, the new administration has yet to set tax policy and our business responds unevenly to the uncertainties of the marketplace. But I am pleased to report that ANPA, while not above the fray, has at least some clear direction for the industry. In no particular order, here are some projects for 1989:

Arthur Ochs Sulzberger

- We will launch hands-on, desktop-publishing seminars, and maintain strong management-training workshops to help you strengthen both productivity and morale.
- On the technical side, we will emphasize distribution equipment and electronics, and we will take the first step—with the U.S. Department of Agriculture's Forest Products Laboratory—on what may become a major research project about new papermaking techniques.
- Adult literacy and NIE will remain our education focuses.
- Opportunities for newspapers to use emerging telecommunications and telephone service—both to enhance our current product and maybe to open the door to new products—will be featured in spring presentations at the Convention and at ANPA/TEC.
- Special government-affairs attention, both state and federal, will be addressed to taxes, waste disposal and recycling. And we will actively respond to challenges on advertising tax-deductions and consumption taxes based on the use of virgin fiber in newsprint. I am happy to report that a special Tax Task Force under Director Frank Batten of Landmark Communications will guide us through the maze.
- We will work with renewed enthusiasm to achieve meaningful workforce diversity.
- Even though the next postal-rate case won't begin until at least late fall or early 1990, we will designate a staff postal-affairs coordinator to help keep us prepared.
- Very importantly, we will respond firmly to the membership's priority on circulation and readership. A new staff director has been named, and several other experienced staffers will be working to develop more tools you can use in this arena. And, in concert with the Newspaper Advertising Bureau, we will dig deeply and quickly for fresh ideas and search out the most promising priorities.

Those are some highlights of our 1989 program. And while we target these areas, we will remain flexible so as to meet challenges to our right to publish or distribute our products. Maybe with hard work and a little luck we will have a banner year, which probably still won't stop our bemoaning.

Arthur Ochs Sulzberger, ANPA Chairman

ANPA
presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Shirley Schainblatt
Circulation Manager, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041;
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 1140 Avenue of the Americas, New York, N.Y. 10036; (212) 391-2155
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601; (312) 977-1933
Southeast
Ned Quenzer and Bob Stites, Quenzer/Stites Inc., 3552 Habersham at Northlake, Tucker, Ga. 30084; (404) 491-1419
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067; (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
Katherine Fanning
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1988 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041

BPA **Presstime** is a member of the Business Publications Audit of Circulation Inc.

presstime

INDEX VOLUME 11, NUMBER 1 JANUARY 1989

Special Report *Mailboxes get fuller every year with catalogs, fliers and shared-mail packages as the boom in direct mail advertising continues. Even the sharp increase in third-class postage costs last year has not stemmed the brisk growth as advertisers, under their own cost pressures, seek greater targeting. All this means that direct mailers' share of total ad spending has been going up, while that of newspapers has been slowly dwindling. Most newspapers have responded with total-market-coverage strategies, some with their own shared-mail programs.* **18**

Forecast: more turbulence *Humbled industry seers expect advertising to stay weak in 1989. A recession—if one comes—would hurt matters more.* **6**

Washington outlook *It's a new Congress and administration, but newspaper interests will find some old federal issues consuming their attention.* **8**

The dreaded 'D-word' *Technological breakthroughs have saved time, yet that relentless taskmaster, the deadline, is no less cruel.* **10**

Laser printers *When they hit the market they shot a scare into phototypesetters, but it's beginning to look as if there's room for both—for a while.* **14**

Marketing at a crossroads *Economic pressures and finer targeting may force newspapers to choose: mass audience or market niche?* **26**

Small syndicates *The "boutiques" of the business offer fresh talent but struggle for success in the shadows of the "Big Eight" and supplemental wires.* **30**

Part-time workers *Use of part-timers has leveled off in some newspaper departments. However, it appears to be growing in newsrooms.* **32**

Profile: Ralph Ingersoll II *From down-to-earth reporter to polished tycoon, this grand acquisitor has newspapering in his blood.* **36**

Essay: Delivering profits. *Consider delivering merchandise as well as newspapers to boost revenues and efficiency, says ANPA's William D. Rinehart.* **37**

Child-care pioneers *Executives at two West Coast newspapers believe day-care centers will boost morale and give them a competitive edge.* **50**

ANPA: the year ahead *Officer nominees are set for the April 24-26 Convention, and the Association's budget priorities for 1989 are established.* **62**

Meeting Deadlines, p. 10

HOLIDAY VALUES
Money Saving Cou
SEARS PRICE
BEN FRANK

Direct Mailers, p. 18
(Cover photo by Claudio Vazquez, John Bowden Studio.)

Modern Marketing, p. 26

Advertising	48
ANPA calendar	60
ANPA news	62
Chairman's corner	2
Circulation	39
Education	42
Employee relations	50
Government affairs	38
Minority affairs	44
News-editorial	46
Newspaper business	61
Newsprint	58
Overset	64
Research	49
'Shoe'	48
Speeches	45
Technology	54
Telecommunications	47

Consumption declines again in October

Newsprint consumption for all users in the United States declined 0.02 percent in October 1988, compared with the same month a year earlier. Had it not been for an additional Sunday during October '88, consumption would have declined about 3 percent.

For the first 10 months of '88, all users' consumption was up 0.6 percent.

U.S. daily newspapers in October 1988 used 1.1-percent less newsprint than in the previous October, but for the 10-month period their use was up 1.4 percent.

Newsprint inventories for newspapers in ANPA's statistical sample averaged 43 days' supply at the end of October, compared with 39 days in October 1987. Stocks of North American mills were up about 29 percent.

Canadian mills operated at 100 percent of rated capacity in October and 99 percent for 10 months.

The operating rates for U.S. mills were 98 percent and 97.9 percent, respectively.

Estimated consumption of all U.S. daily newspapers[1]

Region	**September 1988(r)**	**September 1987**	**% Change**
Northeast	193,497	195,485	-1.0
North Central	160,862	163,148	-1.4
South	238,843	232,221	+2.9
West	173,893	171,328	+1.5
Circulation Size			
up to 25,000	54,229	54,714	-0.9
25,001-100,000	167,851	154,467	+8.7
Over 100,000	545,015	553,001	-1.4
September totals	767,095	762,182	+0.6
Nine-month totals	6,802,314	6,690,989	+1.7
Region	**October 1988(p)**	**October 1987**	**% Change**
Northeast	212,455	215,880	-1.6
North Central	167,568	175,399	-4.5
South	253,726	250,887	+1.1
West	182,711	183,496	-0.4
Circulation Size			
up to 25,000	58,124	59,880	-2.9
25,001-100,000	177,779	164,847	+7.8
Over 100,000	580,557	600,935	-3.4
October totals	816,460	825,662	-1.1
Ten-month totals	7,618,774	7,516,651	+1.4

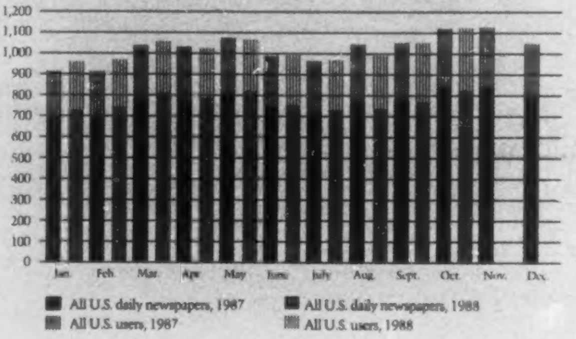
Estimated consumption of all U.S. users

	1988	**1987**	**% Change**
August totals	995,335(r)	1,040,896	-4.4(r)
September totals	1,047,752(r)	1,050,338	-0.2(r)
October totals	1,128,832(p)	1,129,066	-0.02(p)
Ten-month totals	10,199,618(p)	10,138,598	+0.6(p)

Production

	Canada	**U.S.A.**	**North America**
October 1988	864,947	460,531	1,325,478
October 1987	826,574	460,906	1,287,480
Increase or	+38,373	-375	+37,998
decrease	+4.6%	-0.1%	+3.0%
Ten months 1988	8,322,689	4,515,111	12,837,800
Ten months 1987	8,077,413	4,409,254	12,486,667
Increase	+245,276	+105,857	+351,133
	+3.0%	+2.4%	+2.8%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	**Tonnage**	**Days' supply on hand**	**Days' supply in transit**
August 1988	1,006,598	43(r)	5
August 1987	904,565	37	6
September 1988	1,003,967(r)	41	5
September 1987	929,084	36	6
October 1988	947,205(p)	38(p)	5
October 1987	897,438	33	6
Canadian mills			
October 1988	363,574	—	—
October 1987	286,345	—	—
U.S. mills			
October 1988	66,597	—	—
October 1987	47,832	—	—

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
October 1988	585,781	104,761	112,153	802,695
October 1987	592,707	105,517	112,800	811,024
Ten months 1988	5,891,454	1,013,056	1,243,700	8,148,210
Ten months 1987	5,866,089	963,236	1,238,947	8,068,272
Increase	+25,365	+49,820	+4,753	+79,938
	+0.4%	+5.2%	+0.4%	+1.0%
From U.S. mills				
October 1988	419,003		41,508	460,511
October 1987	435,959		19,591	455,550
Ten months 1988	4,180,360		304,285	4,484,645
Ten months 1987	4,171,305		239,191	4,410,496
Increase	+9,055		+65,094	+74,149
	+0.2%		+27.2%	+1.7%
From North American mills				
October 1988	1,004,784	104,761	153,661	1,263,206
October 1987	1,028,666	105,517	132,391	1,266,574
Ten months 1988	10,071,814	1,013,056	1,547,985	12,632,855
Ten months 1987	10,037,394	963,236	1,478,138	12,478,768
Increase	+34,420	+49,820	+69,847	+154,087
	+0.3%	+5.2%	+4.7%	+1.2%

---

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

A2350:2
3/91/89

presstime

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

[illegible]

presstime

INDEX

VOLUME 11, NUMBER 2 FEBRUARY 1989

Special Report *Newspaper art has been revolutionized. Brushes and pens are being set aside in favor of the almost ubiquitous Macintosh personal computer. The people in the art department are changing, too. They used to be photo retouchers and illustrators with a flair for drawing. Now they are "graphics journalists" who are as much at ease in news reporting as they are in artistic work. Although the changes in newspaper art have been most dramatic in newsrooms, advertising and promotion departments also have been affected—and will be even more so in the future.* **20**

Scholastic journalism blues *Programs at many schools are foundering for lack of support and academic recognition, but newspapers are lending support.* **6**

Prime time for NIE *Amid increasing concern about building readership, involvement in Newspaper in Education programs this year may break records.* **12**

User groups *Small or large, loosely knit or formal, they help newspapers get the most out of equipment—and the companies that make it.* **14**

Whither the filler? *From the arcane to the inane, those hole-fillers of yore are largely obsolete but perversely missed by some.* **18**

Tarheel turf battles *Retailers and newspapers alike want to reach those "elegant enclaves" surrounding mid-size markets in North Carolina.* **28**

After the training, what? *Hundreds of foreign journalists annually flock to North America for training. What happens afterward isn't always clear.* **32**

Have ads, will travel *Some newspapers shoot for long-term payoffs by awarding exotic trips to high-spending advertisers.* **34**

Profile: Barney Cummings *This Massachusetts editor brings the bluntness of a Marine sergeant and the heart of a coach to his paper and to his teams.* **36**

Essay: Teamwork works. *Get employees to look outside their niches and your whole newspaper will benefit, says Don P. Campbell of Vancouver, Wash.* **38**

Girding for battle *It's going to be a tough year for newspaper advertising, executives are warned at INAME's 142nd sales conference.* **46**

Easier said than recycled *Politicians have gotten on the recycling bandwagon, but the newspaper solid waste problem defies such a simple solution.* **55**

High School Journalism, p. 6

Newspaper Art, p. 20
(Cover photo by Robert Rathe.)

Training Foreign Journalists, p. 32

Advertising 46
ANPA calendar 66
ANPA news 64
Books 61
Chairman's corner 4
Education 42
Employee relations 57
Government affairs 40
Letters 67
Minority affairs 42
News-editorial 49
Newspaper business 62
Newsprint 55
Overset 68
Research 44
'Shoe' 67
Speeches 43
Syndicates 48
Technology 50
World press 41

CHAIRMAN'S CORNER

The nation's diversity is reflected in its newspapers

I am consistently amazed by the number of apparently intelligent journalists who seek to become columnists. Here I am only 10 months into the profession and already I feel an intense desire to repeat myself. This is not because I believe that what I previously wrote was so earth shattering, but because, as with Christmas shopping, I have delayed to the last moment, and now nothing very brilliant seems to be coming out of the typewriter. So, with apologies to some friends in Missouri who may have a feeling of déjà vu, here are some thoughts:

Arthur Ochs Sulzberger

A while ago I received a letter from an irate reader blasting our profession. She claimed that the press was a vast monolithic organization intent on subverting elected officials by publishing their past indiscretions. "Who elected the press?" the writer asked, and in so doing she less than obliquely suggested that our actions, if not un-American, were, at best, unpatriotic.

People have a funny idea about the press. Sometimes I can understand their confusion, as when ANPA filed an *amicus* brief supporting Hustler magazine in a remote but important First Amendment case. But most of the time we are what we are—some 1,500 independent news organizations, loosely bound together, sometimes through a corporate tie, but generally trying to report the news fairly and expounding our own editorial points of view on matters that strike our fancy. Some of us supported Bush, some Dukakis. Some of us would finance Star Wars and some would scrub it. Some of us are for a death penalty, and some are not . . . and on and on.

Indeed, this is the remarkable strength of the free American press, and it is what my writer and, unfortunately, lots of other writers and readers don't understand. They don't always see and feel the diversity of this great country as it is reflected in its newspapers.

Yet, while on the one hand we must spread the word of the independence of our press and its diversity of opinion, at the same time we must increasingly band together, as we do in ANPA, to share both common problems and common solutions. For none of us has either the time or the finances to single-handedly cover the news, protect our flanks and sell copies of our newspapers, all at the same time.

We are Americans with special powers and responsibilities—that the fearless editors and publishers who were our forebearers knew well—to tell the truth, as we know it, and to help alleviate scourges like bigotry, environmental rape and illiteracy.

Our challenge as journalists is to train the power of truth on these and other scourges, and as Americans to set an example in eradicating them.

Arthur Ochs Sulzberger

Arthur Ochs Sulzberger, ANPA Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Shirley Schainblatt
Circulation Manager, Mary B. Nahan
Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041;
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 1140 Avenue of the Americas, New York, N.Y. 10036; (212) 391-2155
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601; (312) 977-1933
Southeast
Ned Quenzer and Bob Stites, Quenzer/Stites Inc., 3552 Habersham at Northlake, Tucker, Ga. 30084; (404) 491-1419
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067; (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
Katherine Fanning
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices.

Copyright 1989 by ANPA. All rights reserved.

Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER. Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA Presstime is a member of the Business Publications Audit of Circulation Inc.

Circulation Battles

Fast-growing North Carolina provides perfect setting for a study of burgeoning newspaper competition

BY SUSAN DENTE ROSS

A newspaper circulation battle is being waged with varying intensity in some surprising places across the United States—mid-size markets like the Research Triangle of North Carolina and, to a lesser extent, the Charlotte area.

"You're going to see some elbows flying in the areas outside the cities," says Elwood M. Wardlow, associate director of the American Press Institute in Reston, Va. "The big/little newspaper competition is emerging as more focused and determined. What you're seeing now is an intensified and more sophisticated outreach on the part of many metro dailies to suburban readers. . . . They view this not only as a step toward survival but as a step toward growth."

The turf fighting follows the retailers who follow the population, especially in fast-growing states like North Carolina, whose population of 6.5 million is the 10th largest among the 50 states. "The elegant enclaves outside of cities are filled with readers and consumers," says Richard R. Cole, dean of the University of North Carolina School of Journalism, Chapel Hill. "The suburban market is growing and becoming so much more affluent. The papers have to react to the demographics."

The demographics in the Research Triangle—demarcated by Chapel Hill in Orange County to the southwest, Durham in Durham County to the north and Raleigh in Wake County to the southeast—are mouthwatering. The Triangle boasts the highest median family income, nearly $37,000, in the state and the greatest concentration of Ph.D.s and engineers in the nation. It has been cited again and again as one of the nation's most booming, most liveable and most high-tech regions.

At its heart is the 6,700-acre Research Triangle Park, which includes more than 50 businesses employing in excess of 30,000 people. Drawing more than half of its work force from Wake County and another third from Durham County, the park has been a magnet for residential influx to what until recently was forested rural land.

"Suddenly there were hundreds of condominiums going up there with Durham addresses but no real attachment to Durham," says Frank A. Daniels Jr., publisher of The News and Observer and The Raleigh Times. Residents of the three cornerstone communities commute readily throughout the Triangle.

Overnight, a newspaper no man's land had become a marketing necessity.

"Durham wasn't particularly trying to get [these readers] but was getting them by default," Daniels says. "It was no longer economically feasible not to enter these markets. We have to have at least a 50-50 chance of getting those readers."

What really got publishers salivating, though, was the prediction that the area's population would double by 2005, with pastoral Orange County enjoying the bulk of that growth. "A lot of the competitive activity is based on that premise," says P. Lea Campbell Jr., publisher of The Chapel Hill Newspaper. "Chapel Hill itself is a very limited market at this point," he says, but "the metros [are in] a desperate struggle to hang on to the suburbs—to beat back the savage hordes of improved weeklies and community dailies."

THE CATALYST. In 1987, Ottaway Newspapers Inc. bought The Chapel Hill Newspaper and nearby weeklies in Fuquay-Varina and Apex. Within months, what had been a gentlemanly metro tug-of-war escalated into a raging free-for-all.

Campbell says Ottaway's arrival was "a catalyst for developing an accelerated competitive situation that would have happened

Comparative Circulations of Selected Newspapers in the Carolinas[1]

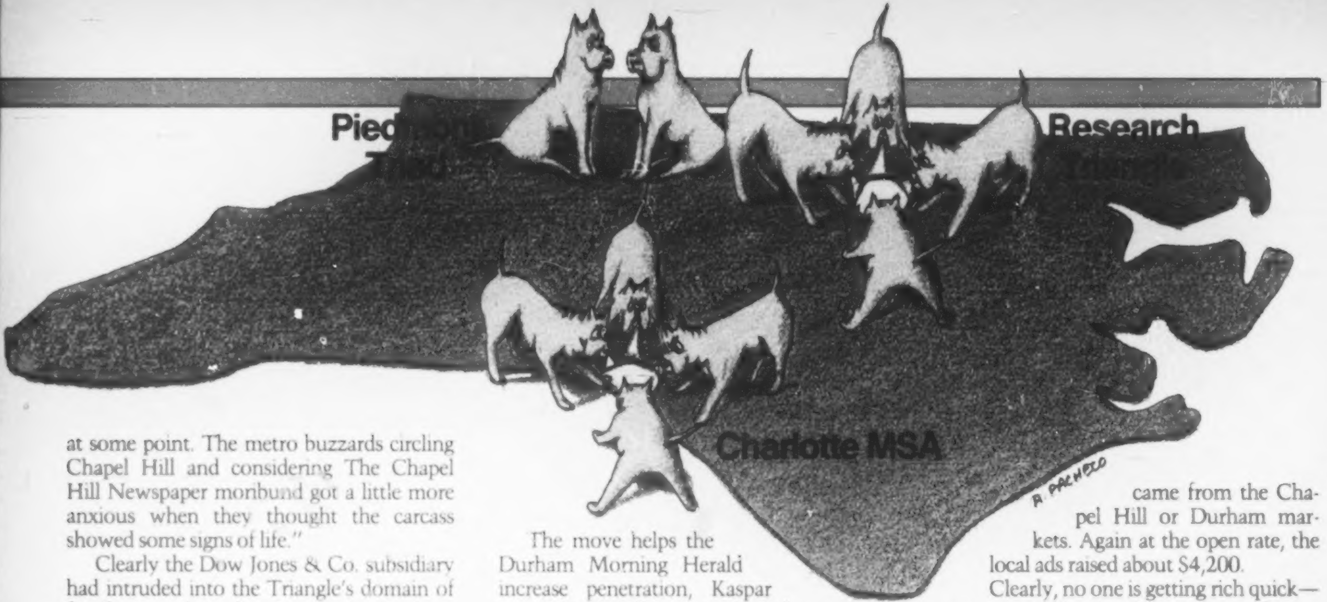
	1988		1983	
	Daily	Sunday	Daily	Sunday
Research Triangle				
The News and Observer (a.m.) and The Raleigh Times (p.m.)	164,375	185,562	163,894	169,525
Durham Morning Sun and Durham Herald (p.m.)	66,870	63,860	61,572	60,180
The Chapel Hill Newspaper (p.m.)	5,181	5,964	5,211	6,505
Charlotte Metro Area				
The Charlotte Observer (a.m.)	231,445	288,331	219,530*	250,638
The Herald, Rock Hill, S.C. (a.m.)	27,276	26,922	24,662	n/a
The Gazette, Gastonia (a.m.)	39,853	43,306	36,303	39,746
The Salisbury Post (p.m.)	25,159	25,287	25,093	24,990
The Concord Tribune (p.m.)	12,433	12,445	12,442	13,380
The Daily Independent, Kannapolis (p.m.)	11,272	12,110	13,371	14,630
The Enquirer-Journal, Monroe (p.m.)	12,664	13,589	12,221	12,587
Piedmont Triad				
Greensboro News & Record (a.m.)	112,583	126,655	108,087	116,177
Winston-Salem Journal (a.m.)	92,607	104,736	105,587*	96,458
High Point Enterprise (p.m.)	32,637	33,192	31,032	31,486

---

[1] ABC averages for 6 months ended Sept. 30, except for The Chapel Hill Newspaper, figures of which are publisher's statements for March 31, 1988, and Oct. 1, 1983

*Includes circulation of sister paper that suspended publication after 1983

Ross is a free-lance writer who lives in Durham, N.C., and teaches journalism at the University of North Carolina at Chapel Hill.



at some point. The metro buzzards circling Chapel Hill and considering The Chapel Hill Newspaper moribund got a little more anxious when they thought the carcass showed some signs of life."

Clearly the Dow Jones & Co. subsidiary had intruded into the Triangle's domain of family-owned media. Previously Durham Herald Co. and The News & Observer Publishing Co. had peaceably coexisted and prospered.

But newcomer Campbell had barely adjusted to the view from his office window when The News and Observer began targeted mailings of The Triangle Observer to 70,000 non-subscribing households in March 1988. The new weekly offered 12 pages of locally produced feature material and advertising in separate editions for each of the three Triangle counties.

The Triangle Observer sprang from "the clear indication from a lot of advertisers in Raleigh that they were looking more and more at the Triangle as one market," Daniels says. "Wake County represents 50 percent of the combined market . . . and it didn't make any sense not to cover the whole market. We want, in a mini-sense, to be what the Chicago Tribune is to the Chicago area."

Ottaway demonstrated its determination shortly thereafter. In May, The Chapel Hill Newspaper began distributing The Picture once a week to 24,000 non-subscribing Orange County households. In tandem, the two publications reach that entire county.

"Our niche is Chapel Hill, Orange County and the bedroom communities of Chapel Hill," Campbell says. "We are determined we will be a must-read for comprehensive local news for people who care about that area. . . . Our challenge is to attract people who have no allegiance, to be attractive to someone from Missouri, (and) to get our share of the retail base."

To complete the opening salvo, in June the Durham Morning Herald unveiled its Chapel Hill Herald, which is wrapped around the Herald every day of the week for Chapel Hill area subscribers and single-copy buyers. Circulation and revenue figures had made it "painfully obvious that we needed to do something, and we decided to do something unusual—to create their (Chapel Hill residents') own newspaper," Publisher Richard J. Kaspar says.

The move helps the Durham Morning Herald increase penetration, Kaspar says. Chapel Hill is not exclusively the province of The Chapel Hill Newspaper, he says. "We are not a new presence; we've been daily in that market longer than (The Chapel Hill Newspaper) has."

Each of the combatants in the Triangle says its publication is progressing nicely while those of the competition are losing money hand over fist. But they all acknowledge that their struggle is aggravated by a plethora of secondary publications that splinter the retail base. The Village Advocate, a Chapel Hill shopper, appears to have captured the lion's share of Chapel Hill advertising. The Daily Tar Heel, the university's student newspaper, is improving its position.

The Chapel Hill Newspaper admits to battle fatigue. It is "fighting very, very hard to recover some of the advertising base that has eroded over the past several years," Campbell says. "It is indeed a dogfight. All the competitors are well-resourced."

A comparison of the products indicates a tight battle. On Thursday, Dec. 1, The Chapel Hill Newspaper contained 14 pages and slightly more than 250 inches of paid display advertising. At its recently reduced open rate, that would pull in $1,000.

In its 12 pages, the Chapel Hill Herald wraparound cornered 270 inches, for about $1,475 of revenue at the open rate.

Something less than half of the 260 inches of paid display advertising in the Orange County edition of The Triangle Observer came from the Chapel Hill or Durham markets. Again at the open rate, the local ads raised about $4,200.

Clearly, no one is getting rich quick—on increased advertising or circulation. Figures for the past five years show two of the three Triangle daily papers have nudged circulation up; the third is down. (See chart, facing page.)

> *"It is indeed a dogfight. All the competitors are well-resourced."*
>
> **P. Lea Campbell**
> **The Chapel Hill Newspaper**

CHARLOTTE, TRIAD. The conflict in The Research Triangle is one of redefined and overlapping markets. On a smaller scale, a circulation war has broken out around Charlotte, the largest city in the Carolinas. But in another heavily populated market in North Carolina—the so-called Piedmont Triad of Greensboro, High Point and Winston-Salem—things so far have been relatively quiet.

In Charlotte, 130 miles southwest of the capital of Raleigh, the metro market is sprawling over outlying communities. As that has happened, the supremacy of The Charlotte Observer as the lone a.m. daily in its primary market has been challenged.

For years the suburban dailies filled the p.m. slot with increasingly "better products in content and printing," says Observer Publisher Rolfe Neill. "Now they are changing their names and de-emphasizing the city of origination, trying to broaden their base in the same way we are trying to broaden ours, and everyone is looking to adjacent counties."

During the '80s, the Observer has pursued a strategy of improved service to the suburbs through more comprehensive Neighbors sections. It publishes a section for each of the six counties contiguous to Mecklenburg County, its home, and has "developed a sort of cafeteria of products so an advertiser can get anything from a single ZIP code to our entire readership through a multiplicity of products," Neill says. "The key to this is recognition that The Charlotte Observer is the underdog in every county except its own."

Almost half of the Observer's circulation lies outside Mecklenburg. Its household penetration in Mecklenburg is nearly 70 percent; in the other counties, it is closer to 10 or 20 percent.

WHICH RESEARCH COMPANY DOESN'T SHIRK TOUGH DECISIONS?

Market Opinion Research, one of America's largest research and consulting companies. When tough management decisions need to be made, you can count on us. Our newspaper consultants know their statistics, but more important, they know the newspaper business. We'll give you the facts you need to base good decisions on. In over 100 newspaper markets in 35 states, MOR's experience has paid off. Make an easy decision: call MOR today.

MOR: the research company that's growing faster than the information industry itself. Serving the newspaper industry with expertise in strategic research and planning, market analysis, consulting services and database management. For MOR information, contact Ronald Mulder, Vice President for Media Research, at 1-800-333-0746 or 1-313-963-2414.

MARKET OPINION RESEARCH
243 W. Congress, Detroit, Michigan 48222
1-800-333-0746 or 1-313-963-2414

Yet the Observer has not always acted the role of the scrappy underdog. Instead it was "sort of blithely going along in the morning as we had been for over a hundred years," Neill says. "Then suddenly we see people deciding to put out a morning paper. Our response has been that we are going to meet any competitor in our time slot."

The first shot came in Rock Hill, S.C., some 25 miles south of Charlotte. Rock Hill lies in York County, which with the neighboring South Carolina counties of Lancaster and Chester makes up one of the wealthiest and fastest-growing areas in the Charlotte Metropolitan Statistical Area. The Observer is contesting Rock Hill's daily paper, The Herald, for readers and advertisers there.

In mid-July, in a dramatic increase from its thrice-weekly Neighbor tabloid, Charlotte introduced The York Observer as a daily community newspaper wrapped outside The Charlotte Observer. The Observer, a Knight-Ridder Inc. newspaper, is devoting significant resources and staff to the new publication, says Editor Richard A. Oppel. He says 28-30 editorial staffers work on The York Observer (including some desk personnel in Charlotte), twice the number previously deployed in York County.

The News & Observer Publishing Co. of Raleigh, which bought The Herald in 1985, shifted the Rock Hill paper to a.m. publication in response both to The Charlotte Observer's circulation gains on The Herald's home turf and to the general preference of many readers for a morning paper, says company President Daniels. The Herald converted its Saturday paper to the a.m. cycle in the fall of 1985, added a Sunday morning edition in March 1986, and went to weekday morning editions last Aug. 1.

"Our circulation is up since," Daniels says, "but our ad revenues are flat and our expenses are up. It's a very very difficult competition."

Herald Publisher Wayne T. Patrick says, "It's been interesting here ever since" the Observer made its incursion. "I think the consumer has seen escalating coverage by both papers." Patrick says The Herald has gained about 2,000 circulation to 29,000 weekdays since going a.m. (see chart, p. 28).

Competition also is heating up elsewhere in The Charlotte Observer's territory. In Gaston County, N.C., The Gazette of Gastonia recently shifted to morning publication. So Charlotte launched The Gaston Observer wraparound, a project personally directed by Publisher Neill, on Jan. 2.

Some see the Greensboro/High Point/Winston-Salem Triad, about 80 miles west of Raleigh, as another potential newspaper battleground, but slow growth and the loss of several key industries have marked the past decade. Thus the Triad population currently offers little of the dynamism of the exploding Research Triangle or Charlotte area that's so appealing to advertisers.

Even so, "all of the (Triad) newspapers have become more aggressive and innovative," says Robert D. Benson, president and publisher of the Greensboro News & Record. "If we are to grow, (we) have to introduce new products, segment our market, be a little more assertive."

Three years ago, "in response to expressions of mass retailers that they wanted a print ad medium that served the total Triad," Benson says, the News & Record introduced The Ledger, a 300,000-circulation publication delivered to every household in the Greensboro/High Point/Winston-Salem MSA plus the nearby city of Burlington. A year ago, however, the Landmark Communications Inc. newspaper lopped off The Ledger's largest edition in Winston-Salem's home county and another in outlying Alamance County to concentrate closer to home.

Many of the mass retailers did not buy the vehicle they had advocated. "It was beyond greater Greensboro that we had the difficulty," Benson says. "As a result of our challenge, most of the area newspapers made some significant improvement in their papers. Winston-Salem Journal introduced a network of neighborhood, very-local news and advertising publications."

Joseph C. Goodman, managing editor of the Winston-Salem daily, owned by Media General Inc., says "Our strategy has always been to consolidate our circulation in our natural market area."

The Ledger was an attempt by the News & Record "to be more aggressive, to break out of its natural territory," Goodman says. "My judgment is that they've failed. I have to assume they've learned that our markets haven't merged yet. Tampa/St. Pete this absolutely is not. It will happen, but it appears to be in the distant future."

The third daily in the Triad, the High Point Enterprise, is a family-owned operation that observers say appears to be content with publishing the Enterprise much as it has for 104 years.

In fact, no one in the Triad currently gives evidence of wanting to engage in an all-out newspaper slugfest. That is being left to others. "It seems to me it's total war in the (Research) Triangle," says Goodman.

"I think the competition's just deadly," comments Cole of the UNC J-school. "There was a certain amount of complacency here before, sure, but I hope the competition doesn't get so deadly it pushes someone out of business."

For now, as API's Wardlow says, each newspaper in the circulation war "is going to have to prove its worth every day." ☐

Consumption hits record

With a big boost in December, newsprint consumption by all U.S. users and by U.S. daily newspapers closed out 1988 at record levels, according to preliminary figures compiled by the ANPA Newsprint Department.

Consumption by all users increased 3.1 percent in December, compared with December 1987. For the year, all-user consumption was up 0.4 percent. U.S. dailies in December used 3.6 percent more newsprint than a year earlier, and for 1988 their use was 1.3-percent higher.

Inventories for newspapers in ANPA's statistical sample averaged 49 days' supply at the end of December, compared with 47 days in December 1987. Stocks of North American mills were up 50 percent.

Canadian mills operated at 98 percent of rated capacity in December and 99 percent for the year. The operating rates for U.S. mills were 100.6 percent and 97.8 percent, respectively.

Estimated consumption of all U.S. daily newspapers[1]

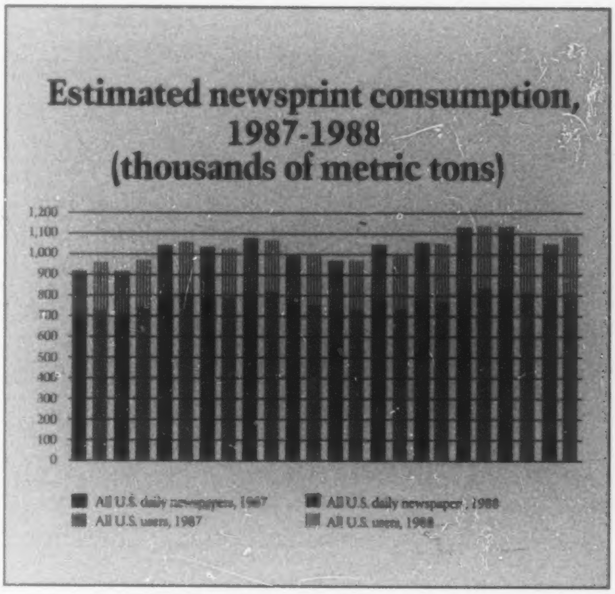
Region	**October 1988(r)**	**October 1987**	**% Change**
Northeast	218,150	215,880	+ 1.1
North Central	168,908	175,399	− 3.7
South	255,366	250,887	+ 1.8
West	185,017	183,496	+ 0.8
Circulation Size			
up to 25,000	62,467	59,880	+ 4.3
25,001-100,000	175,632	164,847	+ 6.5
Over 100,000	589,342	600,935	− 1.9
October totals	827,441	825,662	+ 0.2
Region	**November 1988**	**November 1987**	**% Change**
Northeast	201,776	215,704	− 6.5
North Central	167,946	171,666	− 2.2
South	254,228	258,744	− 1.7
West	186,038	183,295	+ 1.5
Circulation Size			
up to 25,000	59,746	59,042	+ 1.2
25,001-100,000	178,557	166,660	+ 7.1
Over 100,000	571,685	603,707	− 5.3
November totals	809,988	829,409	− 2.3
Region	**December 1988(p)**	**December 1987**	**% Change**
Northeast	198,924	190,053	+ 4.7
North Central	168,418	162,084	+ 3.9
South	254,745	245,947	+ 3.6
West	184,348	180,522	+ 2.1
Circulation Size			
up to 25,000	59,562	58,081	+ 2.5
25,001-100,000	179,337	163,490	+ 10.0
Over 100,000	567,536	557,035	+ 1.9
December totals	806,435	778,606	+ 3.6
Twelve-month totals	9,246,178	9,124,666	+ 1.3

Estimated consumption of all U.S. users

	1988	**1987**	**% Change**
October totals	1,134,970(r)	1,129,066	+ 0.5(r)
November totals	1,089,719	1,134,375	− 3.9
December totals	1,082,319(p)	1,049,980	+ 3.1(p)
Twelve-month totals	12,377,359(p)	12,322,953	+ 0.4(p)

Production

	Canada	**U.S.A.**	**North America**
November 1988	837,306	447,591	1,284,897
November 1987	812,077	437,436	1,249,513
Increase	+ 25,229	+ 10,155	+ 35,384
	+ 3.1%	+ 2.3%	+ 2.8%
December 1988	808,807	464,014	1,272,821
December 1987	779,403(r)	453,045	1,232,448(r)
Increase	+ 29,404	+ 10,969	+ 40,373
	+ 3.8%	+ 2.4%	+ 3.3%
Twelve months 1988	9,968,802	5,426,716	15,395,518
Twelve months 1987	9,668,893(r)	5,299,735	14,968,628(r)
Increase	+ 299,909	+ 126,981	+ 426,890
	+ 3.1%	+ 2.4%	+ 2.9%


Estimated newsprint consumption, 1987-1988 (thousands of metric tons)

Stocks

U.S. publishers[2]	**Tonnage**	**Days' supply On hand**	**Days' supply In transit**
October 1988	935,493(r)	37(r)	5
October 1987	897,438	33	6
November 1988	898,252	37	6
November 1987	866,190	35	7
December 1988	918,331(p)	42(p)	7(p)
December 1987	900,315	39	8
Canadian mills			
November 1988	355,953		
November 1987	297,585		
December 1988	290,488		
December 1987	189,095		
U.S. mills			
November 1988	58,559		
November 1987	46,146		
December 1988	48,093		
December 1987	36,131		

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
November 1988	585,148	112,817	146,962	844,927
November 1987	597,171	108,955	94,711	800,837
December 1988	610,177	101,196	162,899	874,272
December 1987	623,428	110,951	153,514(r)	887,893(r)
Twelve months 1988	7,086,779	1,227,069	1,553,561	9,867,409
Twelve months 1987	7,086,688	1,183,142	1,487,172(r)	9,757,002(r)
Increase	+ 91	+ 43,927	+ 66,389	+ 110,407
	+ 0.001%	+ 3.7%	+ 4.5%	+ 1.1%
From U.S. mills				
November 1988	416,837		38,792	455,629
November 1987	412,181		26,941	439,122
December 1988	436,133		38,347	474,480
December 1987	442,595		17,976	460,571
Twelve months 1988	5,033,330		381,424	5,414,754
Twelve months 1987	5,026,081		284,108	5,310,189
Increase	+ 7,249		+ 97,316	+ 104,565
	+ 0.1%		+ 34.3%	+ 2.0%
From North American mills				
Twelve months 1988	12,120,109	1,227,069	1,934,985	15,282,163
Twelve months 1987	12,112,769	1,183,142	1,771,280(r)	15,067,191(r)
Increase	+ 7,340	+ 43,927	+ 163,705	+ 214,972
	+ 0.06%	+ 3.7%	+ 9.2%	+ 1.4%

---

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.

(r) = revised (p) = preliminary

A2350-2
5/10/89

March 1989

The Journal of the American Newspaper Publishers Association

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

presstime

INDEX VOLUME 11, NUMBER 3 MARCH 1989

Special Report *Newspaper executives have become brutally frank when discussing the industry's biggest ailment: declining readership and stagnant circulation. Their prescriptions are nothing new—better customer service, more compelling and useful editorial material, more promotion. What is new is the realization that this is a critical time for newspapers and that these and other prescriptions must all be tried if the trend is to be reversed. In this report, some of the experts lay down the bottom line: The marketplace has changed and newspapers have to change.* **22**

Public courts, private lawsuits *Reporters covering civil courts may find little on the record as judicial efficiency has spawned greater secrecy.* **6**

Supporting the Third World press *UNESCO's International Program for the Development of Communication gets mixed reviews.* **10**

Contagious communication *Newspapers lose their immunity to computer viruses as they make greater use of personal computers.* **14**

Housing and other perks *Some newspapers have developed innovative ways to help their correspondents afford Washington duty.* **18**

Capitalizing on financial news *Readers want more personal-finance guidance, and newspapers are serving up more and more of it.* **32**

Proofreading revisited *Computer advances have rendered the proofreader all but obsolete, but some still see a role for them.* **36**

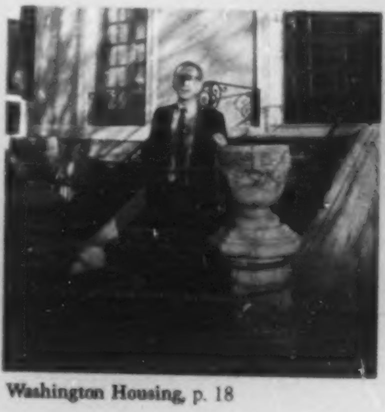
Profile: Kenneth Paik *This Baltimore editor is a rare hybrid: photographer and wordsmith, friend and manager, sensitive writer and hard-boiled newsman.* **38**

Essay: Cut the elitism *Newspapers cannot be relevant to the little man while courting only the champagne crowd, says Georgia educator Conrad C. Fink.* **40**

Circulation success stories *Three newspapers tell how they gained a lot of circulation despite industry trends to the contrary.* **47**

J-schools train for the future *Several pioneering schools have added computer skills to the news-gathering curriculum.* **50**

Automatic guided vehicles *Robotic-like systems for moving newsprint rolls from storage to presses are showing up at medium-size papers.* **60**



Washington Housing, p. 18

Readership and Circulation, p. 22
(Cover photo by Claudio Vazquez, John Bowden Studio.)

Personal-Finance Reporting, p. 32

Advertising 49
ANPA calendar 69
ANPA news 70
Books 71
Chairman's corner 4
Circulation 47
Education 50
Employee relations 54
Government affairs 42
Letters 71
Minority affairs 52
Newspaper business 67
Newsprint 59
Overset 72
Research 48
Speeches 46
Syndicates 44
Technology 60
Telecommunications 44
Training 58
World press 53

CHAIRMAN'S CORNER

Newsprint Disposal Task Force seeks answers to complex issue

Garbage may not be the most compelling subject, but it is difficult to forget last year's five-month, 6,000-mile odyssey of the Long Island barge seeking a site to dispose of its cargo. The captain of the tug hauling the barge was at sea for quite a spell. After a round trip to the Caribbean and a visit to six states and three foreign countries, all the time looking for some place that would take his junk, he returned to New York City where it was eventually burned and the ash buried on Long Island. A long trip with a short moral: No one wants anyone else's garbage—let alone their own.

Cities like New York, which generate huge masses of waste material and which have run out of landfill sites, are not alone in facing a problem. From Wisconsin to Louisiana, from New York to California, the heat is on. No one wants an incinerator cited in their town, and no one wants the ash residue. Certainly no one wants a garbage dump in his or her backyard. The environmentalists quite rightly don't want garbage dumped in the ocean. In fact, the only thing we know to do about garbage is to make it—over 140 million tons of it each year.

Many politicians, who already think that much of what we write should bypass the reader directly for the waste stream, are quick to point out that newspapers are major contributors to the problem. When we point out that nearly a fourth of the 12.3-million metric tons of newsprint consumed in the United States each year is already recycled, they respond that newspapers still constitute about 8 percent of landfill waste. Unfortunately, we are a big, visible target, and their constituents are demanding action.

The problem is that there is ample proof that the recycled paper market is a fragile one. The market for old newspapers collapsed in the Northeast last fall as more cities required citizens to separate their newspapers from other trash for curbside pickup. Yet many legislators continue to stumble—sometimes blindly—into "recycling" programs that they mistakenly think will solve the problem just by legislating old newspapers out of the waste stream.

Among these proposed legislative "solutions" are taxes to fund disposal programs (like this year's 10-cents-a-ton newsprint tax in Florida) and a consumption tax on virgin newsprint, which could cost up to $100 a ton.

The implications for newspapers are grave. Will trash separation regulations burden an already fragile subscriber? Will newspapers face disposal taxes while other media do not? Will politicians suggest printing fewer newspapers or fewer inserts?

Your Board of Directors recognizes that a proper resolution of this complex issue will require expertise from many areas, not only from within the newspaper and newsprint businesses, but from numerous outside disciplines. So, I have appointed a task force of ANPA directors to oversee and guide our efforts. Frank Bennack of The Hearst Corp. will head it, assisted by Charles Brumback of the Tribune Co., Rick Warren of the Bangor Daily News, Charles Rowe of the Fredericksburg Free Lance-Star and Sandra C. Hardy of Calkins Newspapers.

They have begun their work and welcome your input as the inevitable local pressures and "solutions" crop up in your area.

Arthur Ochs Sulzberger
ANPA Chairman

ANPA
presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Shirley Schainblatt
Circulation Manager, Mary B. Nahan
Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041;
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 1140 Avenue of the Americas, New York, N.Y. 10036; (212) 391-2155
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601; (312) 977-1933
Southeast
Ned Quenzer and Bob Stites, Quenzer/Stites Inc., 3552 Habersham at Northlake, Tucker, Ga. 30084; (404) 491-1419
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067; (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA Presstime is a member of the Business Publications Audit of Circulation Inc.

Capacity gain projected at 2,347,500 tons

Scheduled newsprint mill projects between this year and 1991 will add 2,474,100 metric tons of capacity in the United States and Canada. During this time, announced capacity reductions of 126,600 tons will take effect, leaving a net gain for the period of 2,347,500 tons.

In addition, 11 projects totaling another 1,884,000 tons are under consideration. Four other projects of undisclosed capacities also are being considered.

The charts at right show expansion projects that have been announced, as well as machine shutdowns or conversions to other grades of paper [presstime, June 1987, p. 106]. (Note: Full capacity may not be realized in the year of start-up.) ☐

New contract ratified at 2 struck mills

Members of the Association of Western Pulp & Paper Workers ratified a new contract at Smurfit Newsprint Corp.'s mills in Oregon City and Newberg, Ore.

The union struck the two mills last July, but the company used supervisory personnel to continue operations.

Details of the settlement were not available by late February [presstime, Dec. 1988, p. 64]. ☐

$2.2 billion offered for Consolidated-Bathurst

Stone Container Corp. said it would make an offer worth about $2.2 billion for Consolidated-Bathurst Inc. The acquisition would raise Stone's position in the newsprint market to the No. 3 producer in North America, behind Abitibi-Price Inc. and Canadian Pacific Forest Products Ltd.

Consolidated-Bathurst's three largest shareholders—Power Corp. of Canada (40 percent ownership), Bouverie Investments Ltd. (15 percent) and Kuwait Investment Office (10 percent)—have agreed to tender their shares. ☐

Statistics unavailable

Newsprint statistics for January were not available by press time. They will be published in the April issue.

Publicly announced newspring capacity increases

Company	Location	Approximate cost (millions)	Approximate annual capacity[1] (metric tons)
	1989 Start-ups		
Bowater Mersey Paper Co. Ltd.	Liverpool, Nova Scotia[2]	$128	50,000
Finlay Forest Canada Ltd.	MacKenzie, British Columbia[3]	$212	210,000
Gold River Newsprint Ltd. Partnership	Gold River, British Columbia[4]	$320	230,000
Kruger Inc.	Corner Brook, Newfoundland[2]	—	159,750
Newsprint South Inc.	Grenada, Miss.[4]	$347	203,000
North Pacific Paper Co.	Longview, Wash.[3]	—	20,000
Ponderay Newsprint Co. (Canadian Pacific Forest Products Ltd. and publishers)	Usk, Wash.[4]	$300	180,000
F.F. Soucy Inc.	Riviere-du-Loup, Quebec[3]	$ 3	4,000
Southeast Paper Manufacturing Co. (recycled newspapers)	Dublin, Ga.[3]	$325	206,000
		Total	1,262,750
	1990 Start-ups		
Alabama River Newsprint Co. (Abitibi-Price/Parsons & Whittemore, Inc.)	Claiborne, Ala.[4]	$409	220,000
Alberta Newsprint Co.	Whitecourt, Alberta[4]	$360	220,000
Atlantic Packaging Products Ltd. (recycled newspapers)	Whitby, Ontario[4]	—	150,000
Canadian Pacific Forest Products Ltd.	Thunder Bay, Ontario[3]	$245	60,000
Champion International Corp.	Sheldon, Texas[2]	$ 47	6,350
Consolidated-Bathurst Inc.	Grand'Mere, Quebec[5]	—	110,000
Domtar Inc.	Red Rock, Ontario[2]	$ 30	24,000
Gaspesia Pulp & Paper Co. (Abitibi-Price Inc.)	Chandler, Quebec[2]	$ 32	27,000
Kruger Inc.	Trois Rivieres, Quebec[5]	$400	180,000
MacMillan Bloedel Ltd.	Powell River, British Columbia[2]	$ 62	14,000
		Total	1,011,350
	1991 Start-ups		
Howe Sound Pulp & Paper Ltd. (Canfor Corp./Oji Paper Co. Ltd.)	Port Mellon, British Columbia[4]	$355	200,000
		Grand Total	2,474,100

Newsprint machine shutdowns or conversions

Company	Location	Year	Approximate annual capacity decrease (metric tons)
Abitibi-Price Inc.	Alma, Quebec[3]	1989	59,000
Kruger Inc.	Corner Brook, Newfoundland[3]	1990	67,600
Kruger Inc.	Trois Rivieres, Quebec[3]	—	—
		Total	126,600

---

[1] Capacity will not be realized until machine is running at full speed.

[2] Speed-up

[3] New machine(s)

[4] New mill

[5] Net increase, new machine(s) replacing existing one(s)

Full-page ads tout Oklahoma papers

Most of the 233 daily and weekly newspaper members of the Oklahoma Press Association have joined a 10-week advertising campaign trumpeting newspapers published in the state.

The papers began publishing weekly full-page ads in early February to promote the wide reach of Oklahoma newspapers, said J. Leonard Gourley, president of the press association and publisher of Oklahoma City Friday, a suburban weekly.

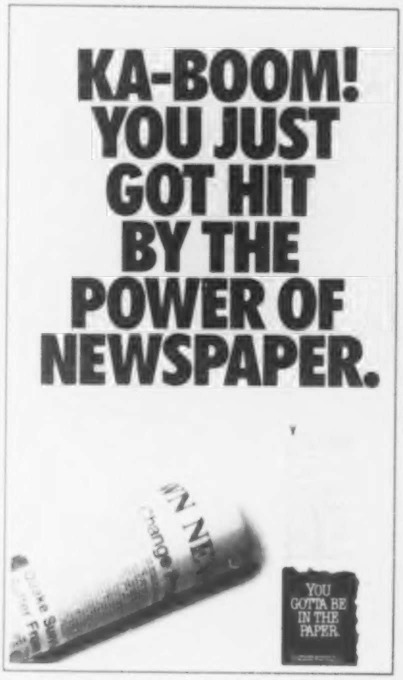
The goal of the ad campaign, whose theme is "You Gotta Be in the Paper," is to gain more advertising revenue, Gourley said.

But the ads are also aimed at the general public, the OPA president said, "with the idea that the newspaper is where people get information about ads and news."

Barry Newton, manager of the Oklahoma Newspaper Advertising Bureau, a division of the press association, said the campaign is different from common newspaper "house ads," which usually appear only when space allows. Participants in the 10-week program are running the ads on designated days of the week.

The press association campaign puts newspapers in a positive light with limited "bashing" of media competitors, Newton said.

Gourley said that 142 weeklies and 48 dailies in Oklahoma are participating in the campaign. He calculated the value of the advertising space donated at $1.25 million. ☐


KA-BOOM! YOU JUST GOT HIT BY THE POWER OF NEWSPAPER.
YOU GOTTA BE IN THE PAPER.

Ads are running on a set schedule in many papers.

Group dailies control larger circulation slice

The amount of U.S. daily newspaper circulation controlled by groups reached another high in 1988, according to an annual compilation by John Morton Newspaper Research.

The circulation of group-owned dailies rose from 51.7 million in 1987 to 51.9 million—83 percent of total circulation, up from 82 percent a year earlier.

Likewise, the number of U.S. dailies owned by groups increased from 74 percent to 76 percent of the total, as the number of group-owned newspapers jumped from 1,212 to 1,247 [presstime, May 1988, p. 106, and April 1988, p. 76].

The number of groups remained the same at 143. A decade ago, the research company said, there were 169 groups—defined as companies owning at least two daily newspapers published in different cities.

Forty-five of the groups publish only two dailies. Fifty-eight of the groups have total circulations of 50,000 or less. Thirty-one others have circulations of 50,000 to 150,000.

Morton Research is part of the Lynch, Jones & Ryan securities firm in Washington, D.C. ☐

Corrections

There are about 70 Black senior executives at more than 1,600 daily newspapers and 300 TV stations in the United States. The number of Black senior executives was incorrectly stated in a February story.

The Sunday circulation of The Concord (N.C.) Tribune was misstated in a chart in the February issue. As of Sept. 30, 1988, it was 13,445.

Presstime regrets the errors. ☐

LEE DIRKS & ASSOCIATES

We specialize in assisting owners in exploring, negotiating, and consummating the sale of their daily newspapers or newspaper groups.

Lee E. Dirks

Owen Van Essen

Suite 210 255 E. Brown St. Birmingham, Michigan 48011
313-646-4230

INFE issues books on economics, invoices

The International Newspaper Financial Executives organization has published two new booklets, one a primer on the economics of newspapers and the other a workbook on ways to implement the Standard Advertising Invoice.

"Newspaper Financial Management: An Introduction" covers history and current trends in the industry, newspaper revenue sources, expense classifications, and key ratios often used by financial executives to evaluate a newspaper's performance. INFE members have received one copy free; additional copies are $15 each. Non-members can obtain the booklet for $60.

"Standard Advertising Invoice" describes approaches taken by some INFE members to implement the SAI, which has been widely endorsed by industry leaders as an important response to advertisers' needs. The SAI booklet is free upon request.

For further information, or to order the booklets, contact Jay G. Matthews at INFE, The Newspaper Center, Reston, Va.; (703) 620-6580. ☐

A2350-2
4/10/84

ANPA Convention Preview

presstime

The Journal of the American Newspaper Publishers Association

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

STANDARDIZATION · POSITIONING · ZONING · COLOR
COLOR · DISCOUNTS · QUICK RESPONSE
POSITIONING · STANDARDIZATION
AD/SAT · QUALITY REPRODUCTION
COLOR · STANDARDIZATION

ROP Shows Signs of Blossoming

ROP
PREPRINTS

presstime

INDEX VOLUME 11, NUMBER 4 APRIL 1989

Special Report *The attention newspapers have showered on advertisers to increase run-of-paper linage may finally be paying off. ROP advertising is shooting up in some markets, and there are signs that the boom in preprints has slowed. Newspapers have wooed local advertisers back to ROP by standardization, expanding volume discount plans, improving color reproduction and offering better positioning of ads. National advertisers, however, still pose a challenge to newspapers as many of the ad buyers remain video-oriented.* **22**

P.S. The mail's piling up *Readers are writing record numbers of letters to editors, a trend papers are encouraging by giving more space to the forum.* **6**

Pay now, read later *Both newspapers and their subscribers are singing the praises of the paying-in-advance option.* **10**

Disconnected *Telephone companies and newspapers are still at odds over information services, and 1989 looms as critical in the contest.* **14**

Government databases *Chock-full of facts, these information banks are a boon to reporters but a bane to some commercial electronic data-retrieval services.* **18**

Refresher course *Journalism educators pull part-time duty at newspapers to keep their skills fresh and enhance their credibility in the classroom.* **30**

Press ahead *Newspapers turn to commercial printing to get more use out of their pricey presses and to generate more revenue.* **34**

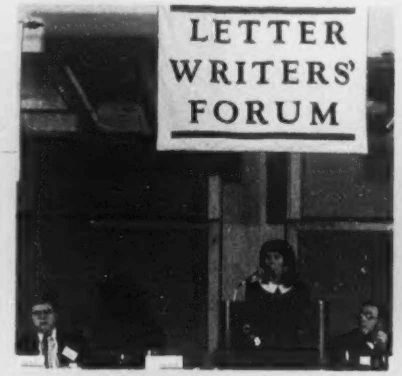
Profile: William H. Cowles 3rd *His manner may be quiet and unassuming, but this Spokane publisher has an agenda that packs a wallop.* **40**

Essay: Publishing perils *Violence against journalists takes a heavy toll on the Mexican press, says Publisher Alejandro Junco.* **42**

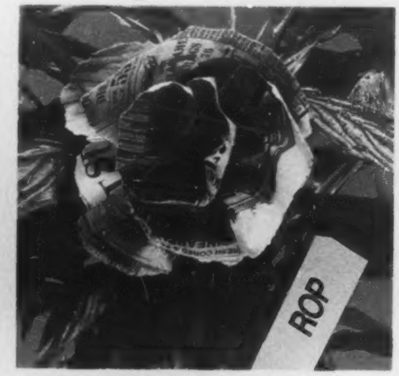
Ouch! *To reduce back injuries, newspapers are setting up programs designed to teach employees how to lift properly, limber up and get in shape.* **54**

Muddled market *The newsprint market is in turmoil as mills have postponed price hikes and resorted to what many say is unprecedented discounting.* **76**

ANPA Convention preview *Newspaper executives head to Chicago for the Association's 103rd Annual Convention April 24-26. Here's a look at the program.* **96**



Letters to the Editor, p. 6



ROP Advertising, p. 22
(Cover photo by Claudio Vazquez.)

Commercial Printing, p. 34

Advertising	50
ANPA calendar	100
ANPA news	96
Books	98
Chairman's corner	4
Circulation	72
Education	70
Employee relations	54
Government affairs	44
Letters	102
Minority affairs	69
News-editorial	64
Newspaper business	92
Newsprint	76
Overset	104
Research	68
'Shoe'	66
Speeches	101
State and local	46
Syndicates	51
Technology	82
Telecommunications	48
World press	80

CHAIRMAN'S CORNER

A salute to NAB's Leo Bogart and what he has done for the newspaper business

Generally speaking, testimonials are best left to occasions in hotel ballrooms following some indigestible dinner. But also, once in a while, it's good to break that cycle and recognize a job well done without the hoopla of a fancy dinner or a swarm of people in black tie.

In June, Leo Bogart, executive vice president of the Newspaper Advertising Bureau, will take down his shingle. A few words about this remarkable man and his contribution to our industry would seem, therefore, very much in order.

Leo, who holds his doctorate in sociology from the University of Chicago, came to the bureau in February 1960 as vice president for marketing, planning and research. His previous experience had been with Exxon, Revlon and McCann-Erickson. Rumors that he developed an advertising campaign for fine-smelling gasoline have yet to be fully documented.

Leo's impact on our industry was almost immediate. He launched the bureau—and newspapers—into audience research, and led the movement for common definitions and methods. He directed a program of consumer studies designed to show advertisers how newspaper advertising fit their marketing needs. And he pioneered in the newspaper reading process that laid out for advertisers how their ads were read and their impact on potential customers. His studies led to the publication of a book, *Strategy in Advertising*, that won wide critical acclaim.

Arthur Ochs Sulzberger

I would doubt that there are many members of ANPA who haven't heard Leo make his pitch on the need to standardize industry procedures or valued his thoughtful guidance as he spearheaded the Newspaper Readership Project and later the Future of Advertising Project. Here, really, is one man who made a difference.

Of course, he wasn't perfect. There are 118 fewer daily newspapers in the United States since he joined the bureau, and even with his hard work we have lost some 8 share points in the market while our major competitor—TV—has gained some 9 share points during the same period. But who knows what the picture would have looked like if Leo had stayed in the oil business.

I believe that I speak for all members of ANPA when I say that we are grateful that Leo chose to dedicate his talents to the world of newspapering. A staunch defender of a free press and a firm believer in an educated public, he has made a major contribution to our industry, which we are pleased and proud to acknowledge.

Arthur Ochs Sulzberger
ANPA Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Charlene Gridley
Circulation Manager, Mary B. Nahan
Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041;
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 1140 Avenue of the Americas, New York, N.Y. 10036; (212) 391-2155
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601; (312) 977-1933
Southeast
Ned Quenzer and Bob Stites, Quenzer/Stites Inc., 3552 Habersham at Northlake, Tucker, Ga. 30084; (404) 491-1419
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067; (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041

BPA **Presstime** is a member of the Business Publications Audit of Circulation Inc.

A quarter will still buy any of 897 daily papers, but 825 others cost from 30 to 50 cents a copy

The predominant price of daily newspapers and Sunday editions remained 25 cents and 75 cents, respectively, in 1988, but there were clear movements toward higher prices.

ANPA's annual survey of single-copy, city-zone, street-sale prices showed that 897, or 50.9 percent, of weekday editions cost 25 cents, compared with 1,037, or 58.9 percent, a year earlier [**presstime**, April 1988, p. 54].

It marked the eighth straight year that more newspapers in the survey sold for a quarter than any other price.

The survey included 1,760 daily newspapers in the United States, Canada, the Bahamas, Bermuda, Guam, Puerto Rico and the Virgin Islands.

Increasing last year were the number of 35-cent newspapers (from 456 to 578), 40-cent papers (from 24 to 39) and 50-cent papers (from 35 to 69).

Newspapers selling for 15 cents decreased in number (from 16 to 12) as did those costing 20 cents (from 35 to 25) and 30 cents (from 156 to 136).

One newspaper, the Leesburg (Fla.) Daily Commercial, still sells for a dime.

Newspaper prices exceed CPI increase

Between January 1988 and January 1989, the average price of a newspaper rose 5 percent while the consumer price index increased 4.7 percent, according to the U.S. Department of Labor's Bureau of Labor Statistics.

The previous year, the average price of a newspaper increased 4.1 percent and the CPI 4 percent [**presstime**, April 1988, p. 54].

Three newspapers in Canada reported that they charge 45 cents for single weekday copies.

Of the 851 Sunday papers in the survey, 271, or 31.8 percent, cost 75 cents. In 1987, 263 Sunday newspapers, or 32 percent, were at that price.

The predominant price of 75 cents for a Sunday paper was first reached in 1987. Prior to that year, 50 cents had been the predominant Sunday price for the years 1981-86.

The number of 50-cent Sunday papers dropped last year from 235 to 213, or 25 percent of all Sunday editions.

The ranks of Sunday papers selling for less than 50 cents also declined, from 86 to 79, but those costing more than 75 cents increased in number—from 224 to 281. This includes 72 costing $1.25 a copy.

As recently as 1985 there was only one $1.25-a-copy Sunday edition—that of The New York Times. ☐

Retail price per single copy of daily newspapers—1988

	15 cents	20 cents	25 cents	30 cents	35 cents	40 cents	50 cents	Total[1]
Alabama	--	2	22	--	--	--	3	27
Alaska	--	--	3	--	2	--	3	8
Arizona	1	--	4	--	12	--	2	19
Arkansas	--	--	30	--	2	--	--	32
California	--	--	104	3	8	--	6	121
Colorado	--	2	21	--	2	--	--	25
Connecticut	--	--	2	7	14	--	--	23
Delaware	--	--	--	--	3	--	--	3
District of Columbia	--	--	2	--	--	--	1	3
Florida	--	--	40	--	6	--	--	47
Georgia	--	--	31	--	2	--	1	34
Hawaii	--	--	2	--	4	--	--	6
Idaho	--	--	8	1	3	--	--	12
Illinois	--	2	24	9	35	--	1	71
Indiana	--	1	33	7	31	--	1	73
Iowa	--	--	8	2	22	2	3	37
Kansas	2	3	35	1	5	--	--	46
Kentucky	--	--	8	--	14	--	2	24
Louisiana	--	--	16	1	10	--	1	28
Maine	--	--	--	--	9	--	--	9
Maryland	--	--	10	2	2	--	--	14
Massachusetts	--	1	9	12	22	--	1	45
Michigan	1	1	19	7	24	--	--	52
Minnesota	--	--	1	1	21	--	2	25
Mississippi	--	1	13	1	4	--	4	23
Missouri	--	1	29	2	14	--	--	46
Montana	--	--	--	--	10	--	1	11
Nebraska	--	--	13	--	6	--	--	19
Nevada	--	--	7	--	1	--	--	8
New Hampshire	--	--	--	6	3	--	--	9
New Jersey	1	--	19	1	2	--	--	23
New Mexico	--	1	12	--	6	--	--	19
New York	--	--	10	12	42	2	2	68
North Carolina	3	2	49	--	1	--	--	55
North Dakota	--	--	--	--	8	--	2	10
Ohio	--	1	33	13	38	--	2	87
Oklahoma	--	--	38	--	13	--	1	52
Oregon	--	--	7	--	12	--	--	19
Pennsylvania	2	--	25	31	36	--	--	94
Rhode Island	--	--	--	1	6	--	--	7
South Carolina	--	--	14	--	--	--	3	17
South Dakota	--	--	10	2	2	--	--	14
Tennessee	--	2	13	--	13	--	--	28
Texas	--	--	91	1	12	--	1	105
Utah	--	--	1	--	2	--	3	6
Vermont	--	--	2	3	3	--	--	8
Virginia	--	2	28	--	5	--	--	35
Washington	--	--	13	--	10	--	2	25
West Virginia	1	1	14	2	4	--	1	23
Wisconsin	--	--	3	2	27	--	4	36
Wyoming	--	1	9	--	--	--	--	10
Totals								
U.S.	11	24	885	130	533	4	53	1,641[1]
Canada	1	1	8	5	44	33	16	111[1]
Bahamas	--	--	--	1	--	--	--	1
Bermuda	--	--	--	--	1	--	--	1
Guam	--	--	--	--	--	1	--	1
Puerto Rico	--	--	4	--	--	--	--	4
Virgin Islands	--	--	--	--	--	1	--	1
Grand Totals	12	25	897	136	578	39	69	1,760[1]

---

[1] Includes newspapers selling for 10 cents (one in Florida) and 45 cents (three in Canada)

Price per single copy of Sunday newspapers—1988

	25 cents	35 cents	50 cents	60 cents	75 cents	$1.00	$1.25	Total[1]
Alabama	2	--	5	--	9	4	--	20
Alaska	--	--	2	--	--	2	--	4
Arizona	--	--	1	--	6	4	--	11
Arkansas	2	2	12	--	1	--	--	17
California	3	--	29	--	14	16	1	63
Colorado	--	--	3	--	6	1	--	10
Connecticut	--	--	--	--	5	2	3	11
Delaware	--	--	--	--	1	--	1	2
District of Columbia	--	--	--	--	--	--	1	1
Florida	3	1	16	--	9	5	1	35
Georgia	--	--	1	--	10	4	1	16
Hawaii	1	--	1	--	2	--	1	5
Idaho	2	--	2	--	4	1	1	10
Illinois	--	1	2	1	6	12	3	25
Indiana	--	--	--	--	6	9	5	20
Iowa	1	--	--	--	3	2	5	11
Kansas	1	--	12	--	2	3	--	18
Kentucky	1	--	3	--	2	4	2	13
Louisiana	3	--	8	1	8	--	1	21
Maine	--	--	--	--	--	--	2	2
Maryland	--	--	2	--	2	1	1	6
Massachusetts	--	--	--	--	2	5	4	11
Michigan	--	--	--	--	12	2	2	16
Minnesota	--	1	5	--	2	3	1	13
Mississippi	1	--	1	--	6	3	2	13
Missouri	3	--	4	1	6	2	1	18
Montana	--	--	--	--	4	2	1	7
Nebraska	--	1	3	--	1	2	--	7
Nevada	--	--	--	--	1	2	1	4
New Hampshire	--	--	--	--	1	2	--	4
New Jersey	1	2	4	--	7	4	--	18
New Mexico	--	1	4	--	4	4	--	13
New York	--	--	1	--	9	17	8	35
North Carolina	--	--	6	--	15	8	--	29
North Dakota	--	--	2	--	1	2	2	7
Ohio	1	--	7	1	13	10	2	34
Oklahoma	13	--	17	--	10	1	--	42
Oregon	--	1	1	--	6	2	--	10
Pennsylvania	--	--	5	--	11	10	--	29
Rhode Island	--	1	--	--	1	--	1	3
South Carolina	--	--	4	--	5	4	--	13
South Dakota	--	--	1	--	1	--	2	4
Tennessee	1	--	3	--	3	5	4	16
Texas	20	3	29	--	30	12	1	95
Utah	--	--	--	--	2	3	--	5
Vermont	--	--	--	--	--	3	--	3
Virginia	--	--	5	--	4	7	--	16
Washington	--	--	2	--	5	6	2	15
West Virginia	--	--	1	--	5	2	1	10
Wisconsin	--	--	1	--	1	5	8	15
Wyoming	--	--	3	--	--	1	--	4
Totals								
U.S.	59	14	208	4	264	199	72	830[1]
Canada	--	1	4	2	4	2	--	17[1]
Bahamas	--	--	--	--	--	--	--	0
Bermuda	--	--	--	--	--	--	--	0
Guam	--	--	--	--	1	--	--	1
Puerto Rico	--	--	1	--	2	--	--	3
Virgin Islands	--	--	--	--	--	--	--	0
Grand Totals	59	15	213	6	271	201	72	851[1]

---

[1] Includes newspapers selling for 30 cents (one in Minnesota), 40 cents (one each in Kentucky and Missouri, and two in Canada), 55 cents (one in Canada), 65 cents (one in Oklahoma), 85 cents (one each in Connecticut and West Virginia, and two in Pennsylvania), and 90 cents (one each in New Hampshire, Pennsylvania and Canada)

Ten newspapers to test degradable plastic bags

Ten newspapers in the eastern United States are expected to begin trial use of degradable plastic delivery bags this month.

The bags were developed by Continental Products of Mexico, Mo., over the past two years in response to requests from newspapers looking for an environmentally safe delivery bag, said Frank Waltrip, Continental's marketing director.

Newspapers are pushing for degradable bags, Waltrip said, because of growing regulations controlling the disposal of plastic and because of their general concern about environmental matters.

The bag to be tested is photodegradable, he said, meaning the chemical products of the bag will decompose when exposed to the sun's ultraviolet rays.

Continental was displeased with a biodegradable bag it developed earlier, in part because it was not as strong as the photodegradable one turned out to be, Waltrip said. A biodegradable bag is one that decomposes when exposed to the elements.

Other companies are researching the development of degradable plastic bags for newspapers. One company, Campbell Films of Orilla, Ontario, a Union Carbide subsidiary, markets a biodegradable bag [**presstime**, Aug. 1988, p. 53]. ☐

ICMA program tracks subscribers who move

The International Circulation Managers Association will launch a program this month to track newspaper subscribers who relocate to another town.

The objective is to make it easier for the newspaper in the person's new community to make contact with the potential new subscriber.

The Subscriber Relocation Program was tested from July to October 1988 by 50 newspapers.

Essentially, the program requires participating newspapers to obtain forwarding addresses of subscribers who move and to provide the addresses to ICMA at The Newspaper Center in Reston, Va. ICMA then sends the new addresses to newspapers of the subscribers' new communities. Those newspapers then solicit the referrals for subscriptions.

ICMA wants at least 300 newspapers to participate, said Joseph B. Forsee, ICMA general manager.

The annual fee is $150 for ICMA members and $250 for non-members. ☐

Consumption rises; inventories climb

Newsprint consumption by all U.S. users totaled 966,439 metric tons in January, an increase of 0.9 percent from the same month a year earlier, according to preliminary figures compiled by the ANPA Newsprint Department.

U.S. daily newspapers in January consumed 717,885 tons of newsprint, 0.4-percent less than the amount they used in the comparable month of 1988.

Newsprint inventories for newspapers in ANPA's statistical sample averaged a 47-day supply, compared with a 44-day supply in January 1988.

Canadian newsprint mills in January operated at 98 percent of rated capacity. The operating rate for U.S. mills was 96.6 percent.

For 1988, the total estimated U.S. newsprint consumption by all users was revised to 12,337,611 metric tons, an increase of 0.1 percent from the 12,322,953 tons consumed in 1987.

Among U.S. dailies, consumption for the year rose 0.9 percent, the revised figures show. The total was 9,210,910 tons, compared with 9,124,666 metric tons in 1987.

Estimated consumption of all U.S. daily newspapers[1]

Region	December 1988(r)	December 1987[1]	% Change
Northeast	184,773	190,053	-2.8
North Central	165,792	162,084	+ 2.3
South	246,315	245,947	+ 0.1
West	174,287	180,522	-3.5
Circulation Size			
up to 25,000	57,299	58,081	-1.3
25,001-100,000	174,860	163,490	+ 7.0
Over 100,000	539,008	557,035	-3.2
December totals	771,167	778,606	-1.0
Twelve-month totals	9,210,910	9,124,666	+ 0.9
Region	**January 1989(p)**	**January 1988**	% Change
Northeast	176,037	181,377	-2.9
North Central	147,905	149,848	-1.3
South	226,524	220,006	+ 3.0
West	167,419	169,823	-1.4
Circulation Size			
up to 25,000	52,653	52,676	-0.04
25,001-100,000	155,360	150,690	+ 3.1
Over 100,000	509,872	517,688	-1.5
January totals	717,885	721,054	-0.4

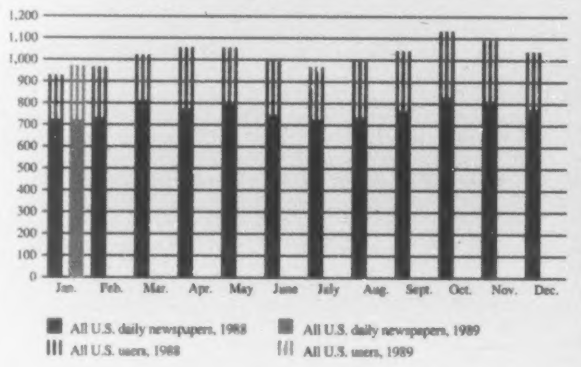
Estimated consumption of all U.S. users

	1988	**1987**	**% Change**
November totals	1,094,128(r)	1,134,375	-3.5(r)
December totals	1,038,162(r)	1,049,980	-1.1(r)
Twelve-month totals	12,337,611(r)	12,322,953(r)	+ 0.1(r)
	1989	**1988**	**% Change**
January totals	966,439(p)	957,597(p)	+ 0.9(p)

Production

	Canada	**U.S.A.**	**North America**
January 1989	850,345	460,240	1,310,585
January 1988	821,781	452,287	1,274,068
Increase	+ 28,564 + 3.5%	+ 7,953 + 1.8%	+ 36,517 + 2.9%

Estimated newsprint consumption, 1988-1989 (thousands of metric tons)



Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
January 1989	564,649	101,275	96,675	762,599
January 1988	548,355	92,149	75,005	715,509
Increase	+ 16,294 + 3.0%	+ 9,126 + 9.9%	+ 21,670 + 28.9%	+ 47,090 + 6.6%
From U.S. mills				
January 1989	396,585		40,307	436,892
January 1988	412,743		24,452	437,195
Increase or decrease	-16,158 -3.9%		+ 15,855 + 64.8%	-303 -0.07%
From North American mills				
January 1989	961,234	101,275	136,982	1,199,491
January 1988	961,098	92,149	99,457	1,152,704
Increase	+ 136 + 0.01%	+ 9,126 + 9.9%	+ 37,525 + 37.7%	+ 46,787 + 4.1%

Stocks

U.S. publishers[2]	**Tonnage**	**Days' supply on hand**	**Days' supply in transit**
November 1988	898,252	38(r)	6
November 1987	866,190	35	7
December 1988	932,492(r)	42	7
December 1987	900,315	39	8
January 1989	934,192(p)	41(p)	6(p)
January 1988	905,230	37	7
Canadian mills			
January 1989	378,234	—	—
January 1988	295,367	—	—
U.S. mills			
January 1989	71,441	—	—
January 1988	51,223	—	—

---

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

High inventories lead to temporary shutdowns at several Canadian mills

Donohue Inc. temporarily shut down a newsprint machine at its Clermont, Quebec, mill March 1 because of high newsprint inventories.

No date for resumption of operation had been announced as of late in the month.

Other recent, temporary mill closings announced by newsprint manufacturers include:

- Abitibi-Price Inc.—Thunder Bay, Ontario, one week in March, and Pine Falls, Manitoba, one week in April. Also, the mill in Iroquois Falls, Ontario, in March was converted to produce specialty newsprint.
- Canadian Forest Products Ltd.—Trois-Rivieres, Quebec, eight days during the period of late January-early February. In addition, its Gatineau, Quebec, mill operated on a four-day week instead of seven days for a one-month period ending March 12.
- Consolidated-Bathurst Inc.—Grand Mere, Shawinigan, and Trois-Rivieres, Quebec, March 25-April 2, and La Baie, Quebec, April 1-8. ☐

NEWSPRINT NOTES

- Finlay Forest Industries Ltd. has **started up a new 210,000-metric-tons-a-year newsprint machine** costing $165 million at its Mackenzie, British Columbia, mill [**presstime**, Aug. 1987, p. 54].

- Daishowa Forest Products Ltd. is reviewing a **study to increase newsprint capacity** at its Quebec city mill by 220,000 to 240,000 metric tons a year, at an estimated cost of $350 million to $400 million.

- Domtar Inc. will spend about $30 million this year to **modernize and expand production** at its Red Rock, Ontario, newsprint mill. Newsprint capacity is expected to increase by 24,000 metric tons a year, with the project's completion expected next year.

- Champion International Corp. will spend $47 million to **refurbish two newsprint machines** at its Sheldon, Texas, mill. The project, scheduled for completion in 1990, is geared toward improving paper quality. Capacity is expected to increase by 6,350 metric tons a year.

- James River Corp. spent $31.8 million to **rebuild a newsprint machine** at its Wauna, Ore., mill. The project, completed in February, will improve quality and increase capacity incrementally, according to the company.

- FSC Paper Co. has postponed making a decision until later this year on whether to proceed with a proposed $20-million project to **improve the quality of recycled newsprint** at its Alsip, Ill., mill.

- West Fraser Timber Ltd. has agreed to **buy a 50-percent stake** in Alberta Newsprint Co. Ltd., which is building a $360-million, 220,000-metric-tons-a-year mill in Whitecourt, Alberta [**presstime**, May 1988, p. 106].

Financial report of paper companies, 1988 vs. 1987

Net income (in thousands of dollars)

	1988	1987	% Change
Abitibi-Price Inc.	$191,100(a)	$125,700	+52
Bowater Inc.	164,317	81,140	+102.5
Canadian Pacific Forest Products Ltd.	323,400	214,000	+51.1
Consolidated-Bathurst Inc.	239,600	214,400(a)	+11.8
Domtar Inc.	111,000	161,000	-31.5
Donohue Inc.	68,700	44,200	+55.4
Fletcher Challenge Canada Ltd.	182,200(a)	140,200	+30
Great Northern Nekoosa Corp.	341,700	200,600	+70.3
Jefferson Smurfit Corp.	144,495	91,996	+57.1
Kimberly-Clark Corp.	378,600	325,200	+16.4
MacMillan Bloedel Ltd.	329,800	280,600	+17.5
Stone Container Corp.	341,800	161,300	+111.9

(a) including extraordinary gain

Glasnost editor-publisher jailed for 10 days

Sergei Grigoryants, editor and publisher of the independent Soviet magazine Glasnost, was arrested and jailed again in March.

According to reports received by the Paris-based International Federation of Newspaper Publishers, or FIEJ, Grigoryants was sentenced to 10 days in prison for taking pictures of an unauthorized demonstration in Moscow March 12.

Since founding Glasnost in 1987, Grigoryants has been repeatedly arrested. Earlier, he spent nine years in prison and labor camps because of his journalistic activities.

Grigoryants has been named recipient of FIEJ's 1989 Golden Pen of Freedom [presstime, March 1989, p. 53]. ☐

Three journalists killed in El Salvador

The Committee to Protect Journalists has called for a prompt government investigation into the killings of three journalists during the recent Salvadoran elections.

The deaths of Salvadoran photographer Roberto Navas, Salvadoran soundman Mauricio Pineda and Dutch cameraman Cornel Lagrouw bring the total number of journalists killed in El Salvador since 1980 to 28.

"These killings are painfully reminiscent of the early 1980s, when there was an open season on journalists in El Salvador," CPJ Executive Director Anne Nelson said. "It is particularly ironic for such a serious assault on the press to take place at the same time that the elections are being publicized as an exercise in democracy." ☐

With Stroessner gone, ABC Color reappears

ABC Color, the award-winning Paraguayan newspaper, published its first issue following five years of government-enforced closure.

Aldo Zuccolillo, owner and editor of the paper, began planning the comeback issue almost immediately after the coup that led to the ouster of Paraguayan President Alfredo Stroessner.

Zuccolillo, given permission to resume publishing by Provisional President Andres Rodrigues, pledged to provide the same investigative reporting for which the paper was known prior to its closure in March 1984 [**presstime**, June 1985, p. 40]. ☐

A2350-2
5-115159

May 1989

The Waning Influence
Of Newspaper Unions

presstime

The Journal of the American Newspaper Publishers Association

CEK
ANPA 103rd Annual
Convention
...to advance the cause of a free press
ANPA

CHICAGO
CONVENTION REPORT

presstime

INDEX VOLUME 11, NUMBER 5 MAY 1989

Convention Report *The most complete coverage anywhere of ANPA's 103rd Annual Convention in Chicago. Speakers ranged from those in the highest levels of government to those in the grass roots of the newspaper industry. They grappled with some of the biggest issues of our time: education, literacy, solid waste disposal, the potential of telecommunications and the workforce of the future. Throughout, but particularly on the last day, they focused on this year's theme, "Readership and Circulation"—a topic that increasingly is dominating all newspaper get-togethers.* 34

Labor's slippage continues *Support for unions is foundering in many industries, and the newspaper business is no exception.* 6

Choices galore *As supplemental wire services expand the newspaper menu, they are giving their full-service forebears a run for the money.* 14

More and sharper color *Many newspapers have overcome the barriers to printing color right. Is magazine-quality reproduction coming?* 20

Personnel policy checkups *The human resources audit is a growing way to comply with government rules and to compete with other industries.* 26

Essay: Save the FOIA *The Freedom of Information Act needs more teeth and some updating for the computer age, says Phoenix Publisher Pat Murphy.* 30

Profile: Joann Byrd *Passion for the printed word, for newspapers and for her community has guided this Northwest editor to success despite personal trials.* 32

Newsracks fly in airport rulings *Several federal court decisions and successful negotiations with cities favor newspaper sales in passenger terminals.* 62

For whom the Bells toll *A draft bill in Congress would unleash the Bell regionals from a ban on electronic publishing.* 68

Demographics and dollars *Newspapers, it's time to take note: Twenty years from now, one of every three Americans will be a minority.* 72

ANPA/TEC preview *The jazzy assortment of equipment in New Orleans June 10-14 will bring newspapers up to speed on technological change.* 94

The facts are in *ANPA's annual compilation of newspaper data shows general stability, but 1988's numbers are not the kind publishers cheer.* 107

Newspaper Unions, *p. 6*

Chicago Convention Report, *p. 34*

Quality Color Printing, *p. 20*

Advertising 82
ANPA calendar 110
ANPA news 109
Chairman's corner 4
Circulation 79
Education 76
Employee relations 88
Government affairs 62
Minority affairs 72
News-editorial 84
Newspaper business 107
Newsprint 92
Overset 112
Postal affairs 66
Research 77
'Shoe' 84
Speeches 111
Syndicates 78
Technology 94
Telecommunications 68
Training 76

CHAIRMAN'S CORNER

Establishing the goals for ANPA's activities

As I assume from Punch Sulzberger the responsibility of speaking in this space, it is not without trepidation. Punch enriched our lives with his vast experience, wisdom and wit. The saving grace is that the things Punch started us doing, we need to continue.

Circulation and readership in all aspects remain atop our agenda and embrace many related segments such as editorial excellence, distribution efficiency, production quality and customer service. In concert with the Newspaper Advertising Bureau, we'll move on this front in full force.

Daily circulation last year was almost 63 million—an increase of 125,000 over 1987. Sunday circulation is at an all-time high of nearly 63 million as well. Non dailies—paid circulation and free—add another 53 million. But in many of our communities we are slipping in comparison to population growth.

Advertisers invested more than $31 billion in newspapers in 1988, a 6.1-percent increase over the previous year. That amounts to a 26.3-percent share of total advertising dollars spent. The problem is that it's a half a percent lower than 1987. Here, full support for the Bureau will pay off.

William H. Cowles 3rd

New entrepreneurial opportunities will be an industry target, too. That means development of information services that complement and strengthen our newspapers—in the first instance, probably, audiotex enhancements—put in place in cooperation, not competition, with telephone companies. And it means helping our editors take advantage of new tools and innovations, like the mind-stretching deliberations of New Directions for News and constantly evolving technologies such as pagination and PC-based color separation for photos and artwork.

Newspaper recycling and other uses of our used-newsprint resource will occupy much attention as we work with our newsprint-producer colleagues, with state and local legislators and with advanced-research scientists. Newsprint is a resource—as it is being read and after it has been read!

Government relations will require constant vigilance, particularly as federal and state officials worry over revenues and taxes to raise them.

Workforce diversity is a personal goal I fully share with Punch and all of you. Last year we saw more and more women and minority employees on the job in our plants; that's both good policy and good business. People are our greatest resource, and we'll work to give them the tips, tools and training they need to manage and work well with innovation and imagination.

And *customer service*, which is much on your minds, applies also at The Newspaper Center as our staff works even harder to respond to your needs promptly, usefully and thoughtfully.

I'm honored to serve as your chairman. Give me your ideas; share your complaints. I am not ANPA. You are. I just work here. And so do you!

Bill Cowles

William H. Cowles 3rd
ANPA Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Charlene Gridley
Circulation Manager, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley
Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport,
Washington, D.C. 20041
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 1140 Avenue of the Americas, New York, N.Y. 10036, (212) 391-2155
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601, (312) 977-1933
Southeast
Ned Quenzer and Bob Stites, Quenzer/Stites Inc., 3552 Habersham at Northlake, Tucker, Ga. 30084, (404) 491-1419
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067, (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA Presstime is a member of the Business Publications Audit of Circulation Inc.

Supplemental Wires Vie for Clients

BY ROLF RYKKEN
presstime staff writer

In April, the Los Angeles Times/Washington Post News Service began offering an abbreviated version of its daily news wire developed specifically for smaller dailies and weekly newspapers.

In February, the Newhouse News Service started a new beat on Capitol Hill to focus on explanatory and analytical stories about the U.S. Congress and the political process.

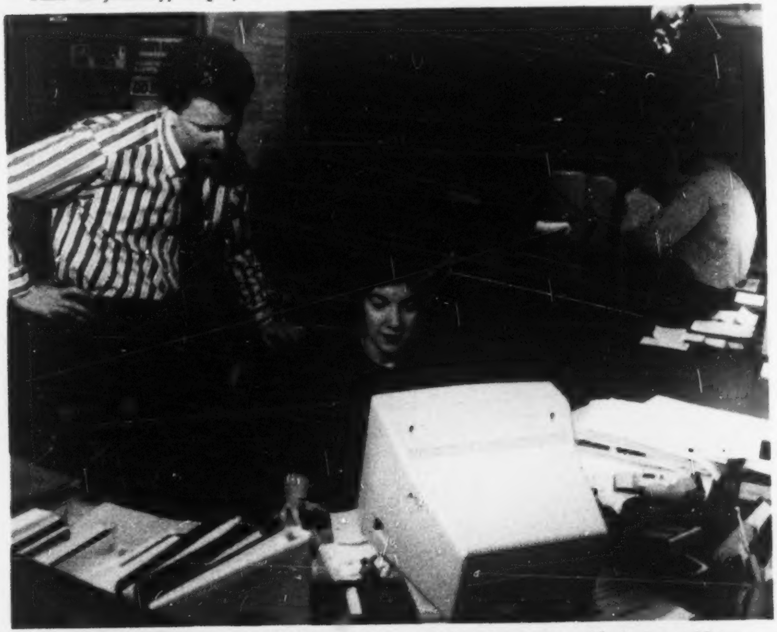
In January, Knight-Ridder/Tribune News Information Services and The New York Times News Service started feeding photographs on a 24-hour basis as an experiment to about 20 subscribers each. Until then this type of offering was chiefly the purview of the larger general news wires—the Associated Press and United Press International.

Also in January, Copley News Service opened a bureau in Mexico to broaden its coverage.

The new bureau, the new beat, the 24-hour photo service and the compact news report are among a host of recent initiatives by what are categorized as "the supplementals." The objective is to stand out in an increasingly competitive field, says Newhouse News Service Editor Robert G. Fichenberg.

Newspapers and their readers are the clear beneficiaries of the new offerings.

"If I were a newspaper editor, I'd be delighted," says Walter F. Mahoney, vice president/sales for the Tribune Media Services syndicate, which sells the newly expanded KRTN wire [**presstime**, Nov. 1988, p. 78]. "They're getting access to so many choices."



KRTN News Editor Margaret Alford (seated, foreground) reviews story with Assistant News Editor Andy Mosher in Washington, D.C., newsroom. In background are (from left) Lifestyle Editor Karen Kirk, Entertainment Editor John Price and Assistant Editor Mike Duggan.

C. David Rambo

Mark Silverman, executive editor of The Rockford Register Star, Rockford, Ill., could not agree more.

"The supplementals are trying to sell services that are in great demand," he says. "There is a great market for it, and they have something to sell."

Evidence of the healthy market can be seen in the dramatic growth in the number of newspapers that have turned to these wires to augment their coverage from the full-fledged wire services. The supplementals have seen their subscriber rolls increase substantially over the past dozen years.

Editors at both newspapers and the supplementals say technological advances that enable newspapers to receive more stories and other features with greater speed have contributed to the boom.

Newspapers pay from $1,000 to several thousand dollars a year to buy a supplemental service, according to their editors, depending on circulation size and negotiating ability.

While the supplementals are experiencing steady growth, they are wary of where the heightened competition might lead. Notes Dan K. Thomassen, editor and vice president of Scripps Howard News Service, "It's a battle for clients."

The rise of the supplementals also reflects in part the continuing struggle for survival at UPI. Many newspaper editors say their selection of supplementals' offerings has been made necessary because of the void created by UPI's decade-long decline.

UPI has repeatedly declined to disclose the number of its newspaper clients, but the AP membership department, which tracks its competitor, puts the number at 222 receiving the full-service wire. The number doesn't reflect the clients who subscribe only to parts of the UPI service, such as the photo or sports wires. AP has 1,400 newspaper members receiving its full report.

Dwight Geduldig, senior vice president for corporate relations says UPI remains a full-service news wire, unlike any of the supplementals.

Some newspaper editors say their use of certain stories from the supplementals also is

BEST AVAILABLE COPY

Supplemental Wire Services in the United States

	Newspaper clients worldwide	North American clients	Stories moved daily	Average number of words per story
Los Angeles Times/ Washington Post	629	n/a*	125	800
The New York Times News Service	550	350	125	900
Scripps Howard News Service	350	330	70	500
KRTN Information Services	270	n/a*	200	800/news 1,400/features
Copley News Service	175	175	40	800
Christian Science Monitor News Service	118	n/a*	25	700
Newhouse News Service	77	77	30	800

*Not available

based on the view that the supplementals at times can be superior to the AP in terms of analysis and in-depth reporting.

The supplemental news services, says Rockford's Silverman, provide "a dimension, a texture in coverage, you don't get from AP. With UPI no longer formidable, AP has gone down. It is one dimensional."

While AP Executive Editor Bill Ahearn acknowledges increased competition from the supplementals, he denies that AP has become "fat and lazy." He says AP provides good writing, analyses and interpretation—and will do so increasingly.

Paul Janensch, president of the Associated Press Managing Editors association, says the supplementals pose "a challenge to AP." They "are getting better and more ambitious and more comprehensive," says Janensch, general manager and editor of The Journal News in Rockland County, N.Y.

THE CHOICES. The supplementals are so named because they are historically viewed as complementary to the more broad-based services.

"We're alternatives, supplementals," says Scott Bosley, editor of KRTN, one of the commonly regarded four main supplementals. "We get 'people stories' as quickly as we can, but not instantly.

Using stories by national reporters from the Knight-Ridder and Tribune companies written specifically for the service allows KRTN to "provide better writing, because we have more time to do so, and we're more interpretive," he says.

Like KRTN, Scripps Howard also uses stories written specifically for its wire from some of its parent company's national reporters, as well as stories from group-member papers and other contributing papers. The others of the major four, the larger NYTNS and LAT/WP, use stories only from their parent newspapers and other contributing papers.

NYTNS, begun briefly in 1899, was reestablished in 1917; SHNS was also founded in 1917; LAT/WP was started in 1963; and KRTN (which changed its name in October from KNT) was launched a decade later.

"The four of us are different enough so that papers can pick two or three," says Douglas A. Gripp, executive editor and editorial director of LAT/WP.

That is what many newspapers do, say wire editors interviewed for a 1988 APME General News Committee Report, "Wire Editors: Who's Doing the Job?"

The committee received responses from 144 wire editors who were asked specifically about which of the four larger supplementals they receive.

Fifty percent said their papers received NYTNS, 44 percent received LAT/WP, 35 percent Scripps Howard and 29 percent KRTN.

"What the supplementals offer is access to the reporting resources of some of the biggest U.S. newspapers," wrote Jonathan Fenby in his 1986 book, *The International News Services*. "Instead of receiving two wire services providing much the same copy, an editor can publish star reporters from The New York Times, the Los Angeles Times or The Washington Post."

The other nationally available, non-specialized supplemental wires in the United States are Newhouse News Service, Copley News Service and The Christian Science Monitor News Service.

(A handful of supplementals, including Gannett News Service and Ottaway News Service, provide stories only to newspapers in their own groups; such services cannot be purchased by outsiders.)

Two other news services—Reuters and Agence France Presse—are international, full-service wires, but because their coverage is not concentrated in North America, they are used as supplementals here.

London-based Reuters serves clients in 150 countries [**presstime**, Aug. 1983, p. 38], says Andrew Nibley, executive editor of Reuters North America. About 200 papers in the United States and Canada now get the Reuters wire, compared with 140 six years ago.

Agence France Presse, based in Paris, has also made some inroads into the North American market. Four years ago, the wire had no North American newspaper clients receiving its services directly [**presstime**, Nov. 1985, p. 69]. Today, four U.S. and 13 Canadian newspaper subscribers directly receive AFP's photographic service and an English-language version of its international news report, says U.S. Manager Philippe Gustin. Seventeen other U.S. subscribers receive the photographic service only.

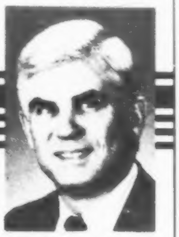
There are also three Canadian supplemental wires, says Bryan Cantley, manager, editorial services, of the Canadian Daily

BOLITHO
STERLING
Newspaper Service

BROKERS
APPRAISERS

DAILIES - WEEKLIES
SUBURBANS & SHOPPERS

Robert N.
BOLITHO
4500 Main - Suite 927
Kansas City, MO 64111
(816) 932-5310
Telecopier (816) 531-7648



James C.
STERLING
P.O. Box 492
Bolivar, MO 65613-0492
(417) 326-8700
Telecopier (417) 326-8701

Newspaper Publishers Association. They are Southam News, Dow Jones Canada and the French-language Telbec service.

GROWTH IN THE '80s. The number of subscribers to the four major supplemental wires in the United States has soared during the 1980s.

LAT/WP has the greatest distribution: 629 newspaper clients worldwide with a total circulation of 110 million. (See chart, p. 15.) Ten years ago, the service had fewer than 200 newspaper subscribers. "It has been a heavy growth," observes Gripp.

In additon, LAT/WP sells an all-sports wire started in 1984 to 167 papers worldwide.

Other supplementals report rapid growth, too: NYTNS, from 285 newspaper subscribers in 1983 to 550 today; KRTN, from 30 in '78 to 270 today; and Scripps Howard News Service, from the 21 Scripps Howard papers in the early '80s to 350 subscribers today.

> *Sixty to 70 percent of our growth in the last two years has been in the secondary markets.*
>
> **Dan K. Thomassen**
> **Scripps Howard News Service**

Editor Thomassen says the latter's phenomenal growth can be linked to the decision by the Scripps family to sell UPI, which it did in 1982. Two years later, SHNS was made available to non-group papers for the first time.

Selling stories to all takers helps to defray the cost of providing a news service to members of a newspaper group, although a supplemental service is not going to be a "big profit center," notes Bosley of KRTN.

Executives of the supplementals decline to divulge what they charge for their services, but some of the purchasing newspapers are willing to say how much they pay.

For example, The Register-Guard in Eugene, Ore., subscribes to NYTNS for $7,800 a year and LAT/WP for $12,700 a year. For the full AP news and sports wire and photo and graphics services, the paper pays $197,000 annually, says Thomas Jacques, assistant managing editor.

The Spartanburg (S.C.) Herald-Journal pays $9,600 a year for KRTN including its graphics service, according to Allen Parsons, managing editor.

The Victor Valley (Calif.) Daily Press pays $1,440 a year for SHNS, which it has been receiving for about nine months. "It's awesome how little I pay for that," says Editor Stephen M. Williams. He says he pleaded poverty in order to get such a low rate, because he can't really afford another supplemental beyond the NYTNS, which costs the Daily Press $3,300 a year.

In addition to bringing in additional revenue, the wires give the parent papers enhanced prestige.

The original idea for LAT/WP was to offer "the high quality of writing of the two parent papers" to other papers, says Gripp. "It's an extension of what the papers do. It projects our logos worldwide."

VISIONARY MARKETING
IS A MATTER OF
REVENUE PERCEPTION.

Not all publishers are expanding their perception of revenue. Only the visionaries. Because they know that multi-dimensional views of revenue lead to market driven strategic plans. The kind of plans that attract the real revenue source: discerning advertisers.

Neasi-Weber is visionary too. We build systems like ADMARC that go beyond operational support. With ADMARC's flexible reporting, data becomes documentation for ad revenue, lineage source and performance.

If you need revenue tracking that can be seen as accurate market intelligence, call us. Because, not everyone is recognizing publishers as the visionaries they are. Only Neasi-Weber.

(818) 895-6900 / CA
(212) 627-9020 / NY
(703) 478-2235 / VA

Visit us at
ANPA/TEC® '89
Booth 2452

Also, says Albert Johnson, executive managing editor of the Post-Tribune of Gary, Ind., "Some of it has to do with the corporations feeling a need to establish themselves as authoritative leaders in the industry."

The first-tier supplementals have achieved near-saturation in the major markets, so they are looking to the smaller markets for new growth, says Thomassen. "Sixty percent to 70 percent of our growth in the last two years has been in the secondary markets," he says, echoing remarks from some of the other supplementals.

In 1986, Scripps Howard developed, heavily promoted and sold a tailored package for small- and medium-size newspapers. Called "Design," the package features a smaller menu and briefer stories. KRTN announced last November that it would begin offering a similar package called "Select." LAT/WP's shorter version, called "Basic Service," on April 1 began distributing about 50 stories of 600 words each.

NYTNS, which started its "Pony" package for smaller papers about 10 years ago, is currently restructuring that tailored service, says Executive Editor John Brewer. He says the old one will be phased out and a new one offered in its place.

> *"We have our professional pride, and we won't sit still."*
>
> **Bill Ahearn**
> **Associated Press**

NUDGING AP AND UPI. All of this activity has not gone unnoticed by AP and UPI.

Several newspaper editors interviewed by **presstime** say the supplemental wires' growth and their increased competition have contributed to UPI's erosion, something the century-old service only partially acknowledges.

Geduldig says UPI may have lost subscribers to the supplemental wires but says those newspapers are "mixing apples and oranges" by exchanging a full-service wire for a secondary one.

AP concedes there has been an increased use of supplementals as well as dissatisfaction among some editors with AP's report.

Executive Editor Ahearn responds, "We have our professional pride, and we won't sit still." He maintains that AP has always provided the kind of analysis, good writing and interpretative reporting some editors say they get from the supplementals, but he predicts that it will emphasize these areas even more in the future. "We're AP—aggressive, aggressive, aggressive," he says.

With AP and UPI looking over their shoulders at the supplementals, and with the supplementals themselves competing vigorously for additional subscribers, the biggest benefactors will continue to be newspapers and their readers.

The supplementals, says Williams of the Victor Valley Daily Press, add "a flavor, a spice," and their continued competition "is wonderful for newspapers." ☐

SUCCESS
THROUGH
PEOPLE
ICMA 1989

The 90th Annual Conference of the International Circulation Managers Association

June 25-28, 1989
Opryland Hotel
Nashville, Tennessee

On June 25-28, 1989, circulation and newspaper executives from the United States and the world will gather in Nashville, Tennessee to discuss strategies and solutions for dealing with the challenges of today and tomorrow—such challenges as leadership training, carrier safety, carrier recruitment and retention, budgeting, newsprint control, customer service, single-copy marketing, home delivery, direct mail, and telemarketing.

They will gather at the 90th Annual Conference of the International Circulation Managers Association, a meeting that year after year gives circulation executives proven strategies to succeed in the marketplace.

Successfully meeting today's challenges requires new ideas and innovative methods—and, it requires interacting with peers and professionals from other branches of the newspaper business.

That's why attending an ICMA Conference is a great investment—for today, and for the future.

The International Circulation Managers Association

The Newspaper Center
11600 Sunrise Valley Dr
Reston, Virginia 22091
(703) 620-9555

Mailing Address:
PO Box 17420
Dulles Airport
Washington, DC 20041

Consumption drops in February

Preliminary estimates indicate newsprint consumption by all U.S. users totaled 921,313 metric tons in February, a decrease of 4.4 percent compared with the 29-day February 1988. Taking this extra day into account, February consumption was down by 1 percent.

For the first two months of 1989, overall consumption declined 1.9 percent. Adjusted, the decrease was 0.2 percent.

U.S. daily newspapers used 693,566 tons of newsprint during the month, 5-percent less than the amount consumed in February 1988.

For January and February combined, their consumption decreased 2.8 percent. Adjusting for the extra day in 1988, the decreases were 1.7 percent for February and 1.1 percent for the two-month period.

Newsprint inventories for newspapers in ANPA's statistical sample averaged a 44-day supply in February—the same as a year earlier.

Canadian newsprint mills operated at 99 percent of rated capacity in February and for the year to date. U.S. mills operated at 93.8 percent and 95.3 percent, respectively.

Estimated consumption of all U.S. daily newspapers[1]

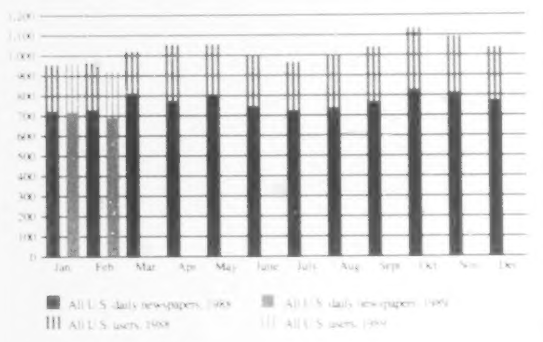
Region	January 1989(r)	January 1988	% Change
Northeast	175,905	181,377	3.0
North Central	148,188	149,848	1.1
South	226,393	220,006	+ 2.9
West	167,280	169,823	1.5
Circulation Size			
up to 25,000	52,453	52,676	0.4
25,001-100,000	154,771	150,690	+ 2.7
Over 100,000	510,542	517,688	1.4
January totals	717,766	721,054	0.5
Region	**February 1989(p)**	**February 1988**	**% Change**
Northeast	166,769	184,731	9.7
North Central	144,675	150,366	3.8
South	220,393	227,621	3.2
West	161,729	167,700	3.6
Circulation Size			
up to 25,000	52,046	55,317	5.9
25,001-100,000	151,898	154,687	1.8
Over 100,000	489,622	520,414	5.9
February totals	693,566	730,418	5.0
Two-month totals	1,411,332	1,451,472	2.8

Estimated consumption of all U.S. users

	1988	1987	% Change
December totals	1,037,485(r)	1,049,980	1.2(r)
Twelve month totals	12,336,934(r)	12,322,953	+ 0.1
	1989	**1988**	
January totals	963,545(r)	957,597	+ 0.6(r)
February totals	921,313(p)	963,880	4.4(p)
Two-months totals	1,884,858(p)	1,921,477	1.9(p)

Production

	Canada	U.S.A.	North America
February 1989	777,326	403,595	1,180,921
February 1988	814,596	434,424	1,249,020
Decrease	-37,270	-30,829	-68,099
	-4.6%	-7.1%	-5.5%
Two months 1989	1,627,671	863,835	2,491,506
Two months 1988	1,636,377	886,711	2,523,088
Decrease	-8,706	-22,876	-31,582
	-0.5%	-2.6%	-1.3%



Estimated newsprint consumption, 1988-1989 (thousands of metric tons)

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
February 1989	[illegible]	[illegible]	[illegible]	[illegible]
February 1988	[illegible]	[illegible]	[illegible]	[illegible]
Two months 1989	[illegible]	[illegible]	[illegible]	[illegible]
Two months 1988	[illegible]	[illegible]	[illegible]	[illegible]
Increase or decrease	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible]	[illegible]	[illegible]	[illegible]
From U.S. mills				
February 1989	373,264		[illegible]	[illegible]
February 1988	411,872		[illegible]	[illegible]
Two months 1989	769,849		[illegible]	[illegible]
Two months 1988	[illegible]		[illegible]	[illegible]
Increase or decrease	[illegible]		[illegible]	[illegible]
	[illegible]		[illegible]	[illegible]
From North American mills				
February 1989	[illegible]	[illegible]	[illegible]	[illegible]
February 1988	[illegible]	[illegible]	[illegible]	[illegible]
Two months 1989	[illegible]	[illegible]	[illegible]	[illegible]
Two months 1988	[illegible]	[illegible]	[illegible]	[illegible]
Increase or decrease	[illegible]	[illegible]	[illegible]	[illegible]
	[illegible]	[illegible]	[illegible]	[illegible]

Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
December 1988	932,492	42	7
December 1987	[illegible]	39	8
January 1989	[illegible]	40(r)	6
January 1988	[illegible]	37	7
February 1989	932,157(p)	39(p)	5(p)
February 1988	[illegible]	37	7
Canadian mills			
February 1989	[illegible]	—	—
February 1988	[illegible]	—	—
U.S. mills			
February 1989	[illegible]	—	—
February 1988	[illegible]	—	—

---

[1] Based on stratified data from newspapers in ANPA statistical sample. Figures in this and other tables are in metric tons.

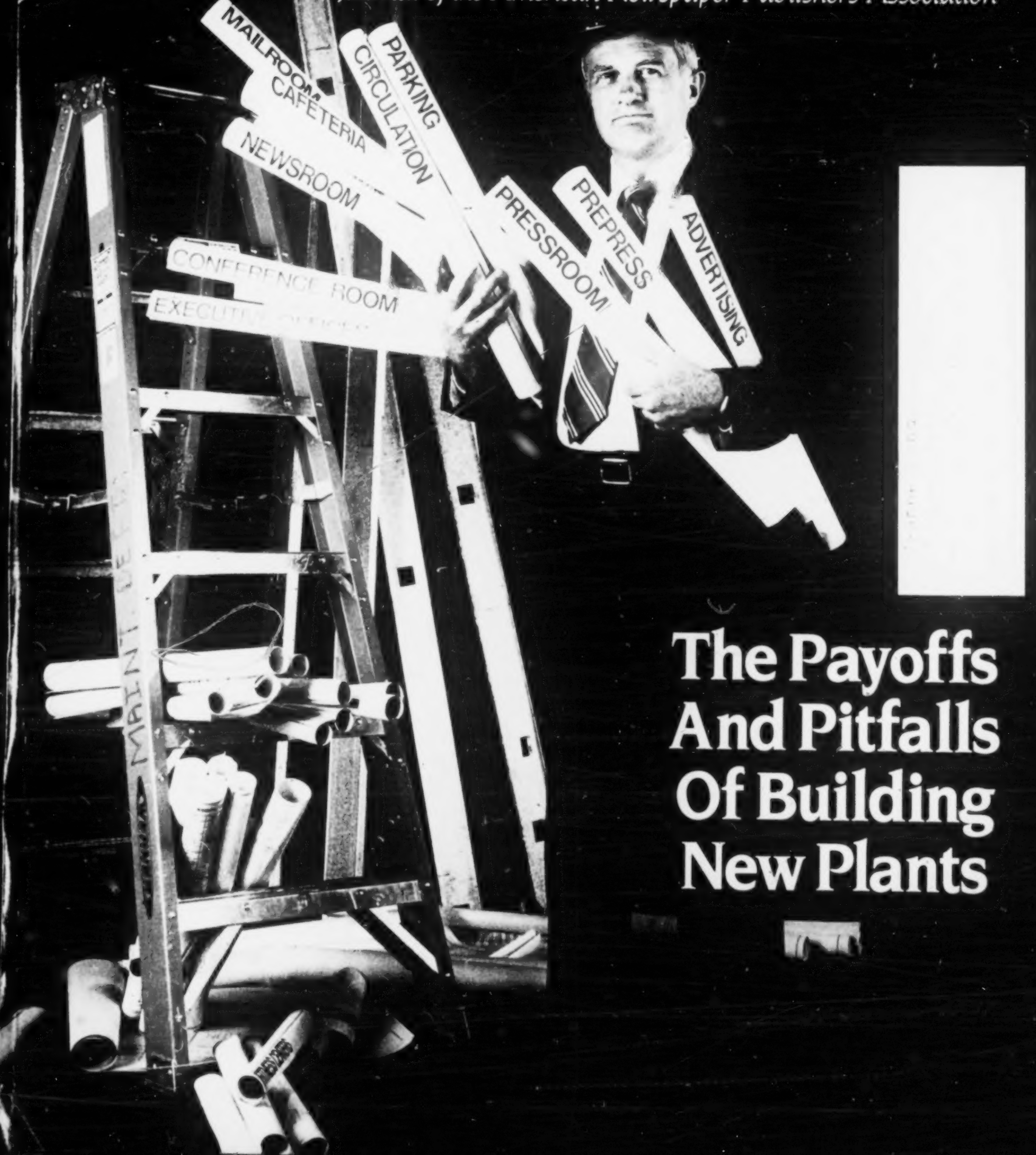
[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

A2350-2
G151 50

presstime

Malady Known as 'RSI' Takes Toll at Newspapers

The Journal of the American Newspaper Publishers Association


MAILROOM
CAFETERIA
PARKING
CIRCULATION
NEWSROOM
PRESSROOM
PREPRESS
ADVERTISING
CONFERENCE ROOM
EXECUTIVE OFFICES
MAINT. DEPT.

The Payoffs And Pitfalls Of Building New Plants

presstime

INDEX VOLUME 11, NUMBER 6 JUNE 1989

Special Report *From coast to coast and everywhere in between, newspapers are building new facilities and renovating buildings. In some areas new plants are following readers to the suburbs, and in others they are being rebuilt in the original downtown area. Wherever they are sited, newspaper facilities sprawl across the landscape with bigger pressrooms and mailrooms. There is another important trend as well. In an effort to attract and keep employees, amenities from jogging trails to child-care centers are being factored into some blueprints.* 32

Computeritis *Its medical name is "repetitive strain injury." And it is causing reporters to wear wrist splints and newspapers to hire physical therapists.* 6

Recruitment blues *Newspaper production has gone high-tech, but its image remains blue-collar. The problem is reflected in low enrollments in printing schools.* 14

Female editors *Although a distinct minority in newsrooms, women are reshaping the definition of news. And guess what? Men helped.* 16

Is R-O-I d-e-a-d? *Return on investment for new equipment is not as apparent as when electronics first allowed newspapers to eliminate staff positions.* 20

Prospecting for newspaper gold *Industry observers see a resurgence of newspaper entrepreneurship, aided by desktop publishing and financial savvy.* 24

Tense alliances *Government officials and newspaper people across the continent share concerns, but not solutions, to the solid waste problem.* 40

Gathering clips *Editors and educators agree: Students who want a spot in the newsroom should get published before graduation.* 48

Profile: John W. Buckwalter *This newspaper company president has been a guiding force in the revitalization of downtown Lancaster, Pa.* 54

Essay: Tailored newspapers *The technology of the '90s will open up limitless marketing possibilities, says ANPA's William D. Rinehart.* 56

Higher pay for graduates *J-school graduates of 1988 drew notably higher starting salaries at daily newspapers than did their 1987 counterparts.* 70

ANPA/TEC '89 preview *This program and exhibit list will help guide you from site to site at this month's trade show and conference in New Orleans.* 92

Repetitive Strain Injury, p. 6

PRESSP
PREPRE
ADV

Plant Design and Construction, p. 32
(Cover photo by Dennis Brack/Black Star)

Female Editors, p. 16

Advertising 79
ANPA calendar 116
ANPA news 118
Chairman's corner 4
Circulation 106
Education 70
Employee relations 82
Government affairs 60
Letters 119
Minority affairs 76
News-editorial 66
Newspaper business 110
Newsprint 108
Overset 120
Research 74
'Shoe' 102
Speeches 114
Syndicates 75
Technology 92
Telecommunications 64
World press 112

CHAIRMAN'S CORNER

Special activity has begun in two priority areas

Two key initiatives are under way after launch at the Chicago Convention, with high-level coordination groups, escalated emphasis and increased resources. They are intended:

First, to help newspapers enhance their circulation and readership.

Second, to preserve the telecommunications conduit/content "diversity principle" in law.

Success on both fronts will result in immediate and long-range benefits for every newspaper in North America.

The *Circulation and Readership Steering Group* will be headed by ANPA Director John Curley of Gannett Co., helped by Jim Batten of Knight-Ridder, Burl Osborne of The Dallas Morning News, Reg Murphy of The Baltimore Sun and Walter Mattson of The New York Times. Drawing on an in-depth internal analysis completed last month by staff experts of ANPA and the Newspaper Advertising Bureau, they will focus our effort on four strategies:

William H. Cowles 3rd

- *Process:* How to assist individual newspapers through proven programs that give circulation and readership high priority over time.
- *Customers:* How newspapers can discover and satisfy customers' diverse information needs now and in the future; how to guarantee high-quality service; and how to build our future audiences.
- *Product:* How to help editors make their papers more compelling and essential so they add value to readers' lives, provide specific benefits for regular reading and are easy to use.
- *People:* How newspapers can recruit, retain, supervise and train high-quality staff.

The *Telecommunications Steering Group* will be coordinated by ANPA Vice Chairman Lloyd Schermer of Lee Enterprises, assisted by Frank Blethen of The Seattle Times, Charlie Brumback of the Tribune Co., Bob Erburu of The Times Mirror Co., Bob Johnson of Newsday and George Wilson of the Concord (N.H.) Monitor.

Their expertise will lead us in an all-out campaign to safeguard the diversity principle from ill-considered court challenges and from the massive but poorly founded congressional lobbying efforts of regional telephone companies to gain unfair control of America's information future [**presstime**, May 1989, p. 48].

The American people will be better served by a Congress willing to reaffirm its commitment to a policy that encourages diversity of information sources. I know you will want to join the effort in ways appropriate to your own individual convictions, and I thank you in advance for that.

It is fitting that these two initiatives began at the recent Convention so superbly produced by Charlie Brumback and his Convention Arrangements Committee. For if an annual Convention ever focused our attention on important issues for ourselves and for our society and brought forward inspired leadership, Chicago did!

Bill Cowles

William H. Cowles 3rd
ANPA Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Charlene Gridley
Circulation Manager, Mary B. Nahan
Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041
(703) 648-1000
FAX (703) 620-4557

Advertising Sales Representatives
East/Southeast
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 401 Park Ave. South, New York, N.Y. 10016, (212) 545-5100
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601, (312) 977-1933
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067, (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA **Presstime** is a member of the Business Publications Audit of Circulation Inc.

DIFFERING VIEWS ABOUT RECYCLING

Consultation Bridge Built For Waste-Paper Stream

BY TONDA F. RUSH
and KEVIN GRANT

A group of newspaper executives and newsprint producers sat down May 5 with a delegation from the Northeast Governors Conference called the Northeast Recycling Council. The purpose, said the organizers candidly, was to see what the state governments had to do to get newspapers to use more recycled newsprint.

The discussion was conducted cordially, if somewhat gingerly. State recycling experts talked about a glut of old newspapers' being amassed on the East Coast where recycling programs have foundered because of an insufficient market for recycled products. Newspaper people talked about their mixed experiences with recycled newsprint.

The talk was going smoothly enough until someone mentioned the time McDonald's ran a free-standing insert with a phonograph record in it. The plastic, it was said, really gummed up the works at Garden State Paper Co., the oldest producer of recycled newsprint in the country. This was typical of the kinds of quality challenges facing the recyclers.

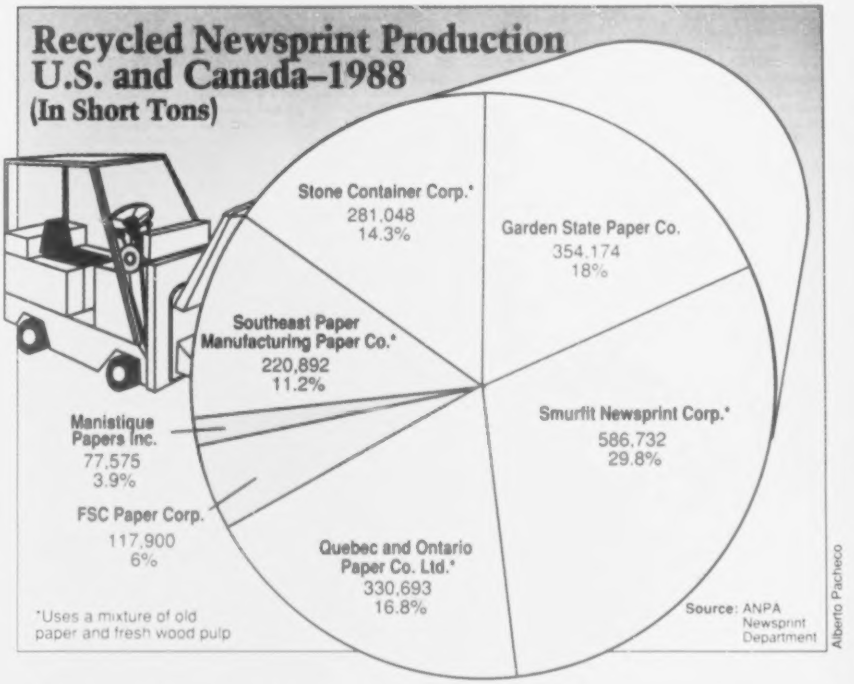
That was when one state official whose mission, after all, is to manage solid waste, not to promote newspapers, made the comment that sounded like a wake-up call.

"Maybe it is time for newspapers to begin exercising responsibility about the types of advertising they accept. Maybe things like the McDonald's ad belong in direct mail."

Rush is ANPA director/newspaper plans and projects. Grant is ANPA manager/state affairs.

Tonda F. Rush

Kevin Grant



Recycled Newsprint Production U.S. and Canada–1988 (In Short Tons)

*Uses a mixture of old paper and fresh wood pulp

Source: ANPA Newsprint Department

Alberto Pacheco

Heads nodded. They all belonged, not surprisingly, to the government people in the room.

Other heads looked up in surprise. Smiles froze on their faces. This guy, you could see them all saying to themselves, couldn't be serious.

Finally, Newsday Publisher Robert M. Johnson, who has become the Smokey the Bear of recycling, stood and looked at the man. "You can forget that idea. You will never sell it," he said.

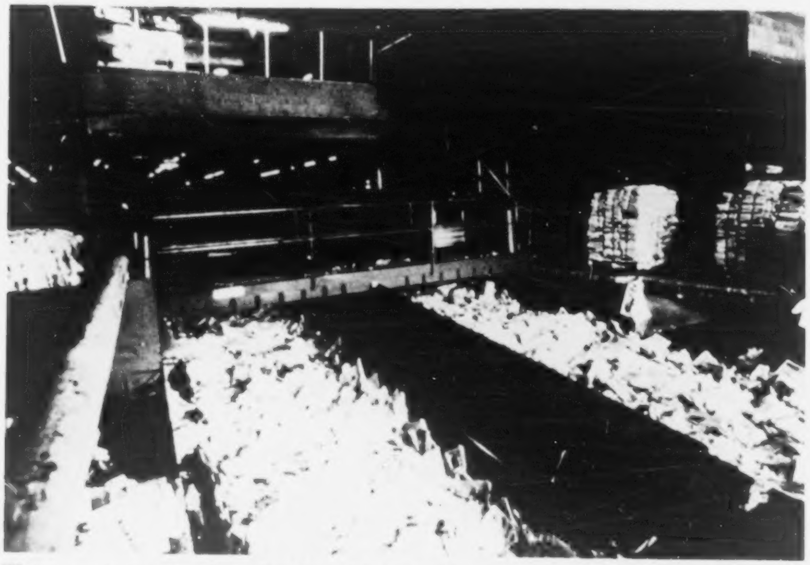
There was tension, no mistake about it. The newspaper people realized that the government managers found such a proposal to regulate the advertising market perfectly reasonable. They call it " "source reduction." And to the government people, the message was clear that from the newspaper business, at least, cooperation was freely offered, but coercion could pull the plug.

Yet when the meeting ended—possibly the first time in history that such a large group of newspaper people sat down with such a disparate group of government people to figure out what to do about trash—a bridge for consultation had been built.

No commitments were made, no ground given. The state government people continued to threaten newsprint taxes and disruptive laws to require use of recycled newsprint. The newspaper people continued to say they could not use more recycled newsprint than the market will produce. But all sides agreed to keep talking.

After all, whether the speakers were newspaper people or government officials, they all live in states where the landfills are about to fill up. And they were all concerned.

But what about all the food packaging and the lawn clippings in landfills? Is any-



Waste newspapers enter the production stream at Garden State Paper Co.'s Garfield, N.J., mill that produces 100-percent recycled newsprint.

thing being done about them? What about the advertising mail? Are the states going to try to tax it, too?

Yes, in fact, they might, if they can find a way to do it. But right now, newspapers are in the bullseye.

Why?

They are visible. They use about 6-percent of landfill space. Newspapers look more like other newspapers than packages look like other packages. They draw attention to themselves.

They are recyclable. Unlike food waste and some other paper products, they can be reused.

Newspapers editorialize about responsible solid waste management, but what do they do about it? When stacks of old newspapers pile up in recycling centers with no buyers in sight, will the local publisher begin to think harder about using recycled newsprint?

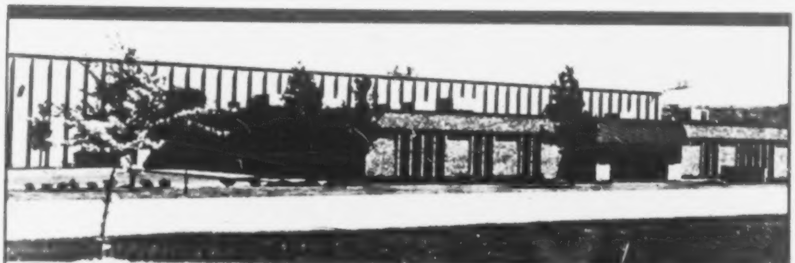
These discussions are beginning all over the country—now in the Northeast and in California; newly begun in Oregon, Wisconsin, Louisiana and Minnesota; soon to arrive, no doubt, in Illinois and West Virginia, where the landfills are expected to be full in five years; and eventually even in Montana, where landfill space is, as in many other states, running short.

The problem in the Northeast, and soon to be in other regions unless there is careful planning, is that communities dived into recycling and failed to ask first whether there was anything the paper could be recycled *into*. The markets were quickly saturated, as New Jersey and Pennsylvania each picked up 200,000 short tons a year of old newspapers. Garden State, the closest newsprint recycler, is able to use only about 200,000 tons annually from all of its sources combined. So attention quickly shifted from collection to additional uses of the paper. "Developing markets" has become the shibboleth of solid waste managers.

What can we do to get newspapers to use more recycled newsprint? The question is being nailed on the publisher's door like the 95 Theses. Taxes and mandatory-use bills are among the pointed suggestions. For example:

- In California, a bill moving quickly through the legislature would require newspapers and other publishers to use recycled newsprint for 25 percent of their total newsprint consumption by 1991, and 50 percent by 2000. In addition, there is continued discussion of hefty taxes on virgin newsprint.
- In Connecticut, a mandatory-use bill has been reported out of the Joint Environment Committee by a favorable vote of 25-0 and will be placed on the Connecticut House of Representatives' calendar for consideration. The bill would require use of recycled newsprint for 20 percent of a newspaper's consumption by 1993 and 90 percent by 1998.
- In Wisconsin, the Senate Urban Affairs, Environmental Resources, Utilities and Elections Committee is planning to draft a bill to require a consumption tax on virgin newsprint used by newspapers in the state.
- In Oregon, the Oregon Newspaper Publishers Association is working to defeat mandatory-use legislation.

State press associations are having to move very quickly to meet these challenges. In most states, a task force including executives from the largest newspapers (who use the most newsprint) has been formed. A



PROFIT FROM OUR EXPERIENCE

The experience we've gained from serving the printing industry for 75 years can help you in making equipment decisions ideally suited to your capacity and needs. So when it comes to pre-owned web offset presses, add-on units, typesetting systems or auxiliary equipment, come to the source.

INLAND NEWSPAPER MACHINERY CORPORATION
Visit us at ANPA/TEC® '89 Booth 1918
1-8CJ-255-6746 • Lenexa, Kansas
An Inland Industries Company

typical example is the Wisconsin Newspaper Publishers Association, which in May moved quickly on the tax matter by naming two executives to a new task force: A. Douglas Lyke, publisher of the Ripon Commonwealth-Press, and James Burgess, publisher of the Wisconsin State Journal in Madison. Their third team member is an outside consultant.

In Oregon, ONPA not only began direct talks with environmental groups, but it also will be creating a study commission in cooperation with the state's Department of Environmental Quality. In New York state, a task force headed by Johnson of Newsday has begun direct talks with Gov. Mario Cuomo. In Pennsylvania, a task force chaired by Sandra C. Hardy, vice president of Calkins Newspapers, is talking with state officials about attracting new recycling businesses to the state.

Other task forces are being formed or have already rolled up their sleeves.

Working with ANPA, newspaper executives are gathering data about their newsprint markets, their newsprint consumption and the ultimate resting place of that 8 million tons of newsprint that has no better place to go after use than to the landfill.

ANPA's Newsprint Resources Task Force, headed by Frank A. Bennack Jr., president and chief executive officer of The Hearst Corp., has commissioned studies of recycled fiber, solid waste options and the impact of source separation on consumers and newspapers. It soon will report its findings and recommendations.

In the meantime, there are precautionary measures newspaper executives can take.

1.) Appoint someone at your newspaper to be responsible for compliance with environmental laws, including solid waste and recycling on the local and state level.

2.) If your state press association staff has not yet become acquainted with the issues, urge it to do so. Legislation in this area tends to emerge full blown and to move quickly.

3.) In those states with legislative or gubernatorial study committees, task forces or commissions, newspapers should make every effort to be represented or at least establish a way of monitoring activities. The work products or recommendations of such groups often become legislation.

4.) Look at the history of recycled newsprint at your newspaper. If someone asks whether the newspaper is using all it could use, know the answer.

5.) Understand the solid waste disposal options. Everyone knows that landfills will always be necessary and that incinerators must sometimes be used to augment them. Waste newspapers will continue to feed both. But experts in the field have reached a broad and deep consensus that everything that can be recycled should be. First.

6.) Know that there is not even 2 million tons of recycled newsprint produced each year to supply a 13.6-million-ton demand. Newspapers cannot solve solid waste problems overnight by switching to recycled newsprint. On the other hand, if newspapers do not demand more of it, no more will be made.

7.) A number of localities have created source separation and collection programs independent of state law. Document any unwarranted or adverse consequences they may have on your operations—subscription cancellations, for example.

Finally, stay tuned. There is opportunity as well as challenge in this crisis. ☐

USA TODAY • The Washington Post • AP Newswire • Congressional Quarterly • Chicago Tribune • Orange County
Times • Chicago Sun-Times • Daily Oklahoman • St. Petersburg Times • The Dallas Morning News • The Daily Record •
Louisville Courier-Journal • Harrisburg Patriot & Evening News • Tulsa World • Gannett News Service • Arkansas
(Minn./St.Paul) • The Sacramento Bee • The Journal Record • Florida Trend • Tulsa Tribune • Westchester Rockland
Statesman • Omaha World-Herald • AP Political Service • Montreal Gazette • Toronto Star • Colorado Springs Gaze
• Arizona Trend • CMP Publications • PROFILE Information • Dow Jones News/Retrieval ® • USA TODAY • The Was

More Newspaper Databases Than Any Other Source.

DataTimes®

Newspaper Library Systems • International Online Network

1/800/642-2525

14000 Quail Springs Parkway • Suite 450 • Oklahoma City, OK 73134
405/751-6400, FAX 405/755-8028

ANPA Booth #1670

Colorado Springs Gazette-Telegraph • American Banker • The Daily Texan • The Bergen Record • Arizona Trend •

Annual capital expenditure survey shows 465 plants spent record $1.6 billion last year

Newspapers participating in ANPA's annual survey of capital expenditures spent nearly $1.6 billion on new buildings, plant expansions and new equipment in 1988. It was the highest amount ever recorded in the survey and represented a 25-percent increase in spending over the previous year.

Thus, the billion-dollar barrier was cleared for the fourth straight year. And respondents indicated that 1989 will do likewise, as they projected just under $1.4 billion in capital outlays before the year is over. (See charts below.)

In recent years, the survey projections have proved to be remarkably true to the actual spending figures reported a year later: for 1986, $1 billion projected, $1.1 billion spent; 1987, $1.2 billion projected, $1.2 billion spent; 1988, $1.6 billion projected, $1.6 billion spent.

The survey is mailed each year to all of the approximately 1,100 plants that print ANPA-member newspapers. Of them, 465 responded to the latest questionnaire—444 in the United States and 21 in Canada. The response rate, which fluctuates annually, was slightly below that of the previous year, when 490 plants returned the questionnaires [**presstime**, June 1988, p. 128].

> *Newspaper respondents also projected 1989 spending of nearly $1.4 billion.*

Peter P. Romano, ANPA director/technical services, said the annual fluctuation in survey participation should be taken into account in comparing year-to-year data.

In 1988, respondents spent $581.8 million on plant expansion and modernization, new buildings, land, parking and garages. That represented a whopping 107-percent increase over 1987 expenditures of $280.7 million in those categories. Projected 1989 expenditures for these purposes were put at $492.8 million.

New equipment purchases totaled $974.6 million in 1988, up from $895 million in 1987. This year's planned spending for new equipment was put at $884.7 million.

Telecommunications expenditures soared 151 percent in 1988—to $21.1 million, compared with $8.4 million in '87. Expenditures were projected to be $17.5 million this year.

A further examination of survey numbers reveals that:

- The pressroom remains king of the equipment expenditures, though spending decreased from the previous year. In 1988, newspapers spent $386.2 million for equipment in this part of the plant, or 11-percent less than the $434.2 million spent in 1987. Respondents estimated pressroom expenses will rebound this year to $424 million.
- Mailroom equipment purchases also continued to take a large chunk of the newspaper budget. Expenditures were $125.9 million in 1988, up 29 percent from

Chart 1—1989 Estimates

Newspaper Plants Participating[1]	**U.S.** 444	**Canada** 21	**Totals** 465
Plant Expansion and Modernization			
New building	$322,295,538	$1,368,224	$323,663,762
Addition to existing building and/or satellite building	55,831,675	50,000	55,881,675
Modernization of existing building	61,364,831	2,140,529	63,505,360
Additional land, parking, garage	49,696,274	57,055	49,753,329
Subtotal	$489,188,318	$3,615,808	$492,804,126
Telecommunications	16,484,674	1,023,000	17,507,674
New Equipment			
Computers (hardware and software)			
Front-end systems—editorial, classified, advertising	$ 82,617,393	$ 2,204,790	$ 84,822,183
Business—accounting, circulation	62,387,470	701,853	63,089,323
Personal computers	15,215,117	411,416	15,626,533
Library systems	2,280,506	1,113,290	3,393,796
Desktop publishing	4,119,953	875,421	4,995,374
Bar Coding	537,245	1,000	538,245
Composing room	17,678,101	1,966,587	19,644,688
Camera—platemaking, editorial photo department	12,513,731	802,209	13,315,940
Color scanners and color separation equipment	14,549,276	166,781	14,716,057
Pressroom	422,484,921	1,568,334	424,053,255
Mailroom	103,956,744	4,998,582	108,955,326
Newsprint handling and warehouse equipment	19,562,970	16,567	19,579,537
Energy, power and security management systems	7,618,276	93,404	7,711,680
New telephone and radio systems	15,014,880	60,347	15,075,227
Transportation—automobiles and trucks	32,995,171	1,736,549	34,731,720
New furniture and office equipment	28,230,666	987,118	29,217,784
Newspaper vending machines	9,705,712	2,753,702	12,459,414
Commercial or job printing equipment	7,570,607		7,570,607
Waste Ink Reclaiming Equipment	756,420	585	757,005
Other	4,457,435	59,090	4,516,525
Subtotal	$864,252,594	$20,517,625	$884,770,219
Estimated Total Outlays	$1,369,925,586	$25,156,433	$1,395,082,019

Chart 2—1988 Expenditures

Newspaper Plants Participating[1]	**U.S.** 444	**Canada** 21	**Totals** 465
Plant Expansion and Modernization			
New building	$334,748,109	$47,348,000	$382,096,109
Addition to existing building and/or satellite building	64,722,352	50,000	64,772,352
Modernization of existing building	79,884,554	6,939,000	86,823,554
Additional land, parking, garage	46,704,269	1,400,000	48,104,269
Subtotal	$526,059,284	$55,737,000	$581,796,284
Telecommunications	18,858,153	2,250,000	21,108,153
New Equipment			
Computers (hardware and software)			
Front-end systems—editorial, classified, advertising	$ 101,713,349	$ 8,484,242	$110,197,591
Business—accounting, circulation	69,581,092	6,703,390	76,284,482
Personal computers	16,035,636	1,360,750	17,396,386
Library systems	3,805,636	1,372,500	5,178,136
Desktop	4,993,958	923,800	5,917,758
Bar Coding	853,094	406,000	1,259,094
Composing room	23,685,165	4,014,000	27,699,165
Camera—platemaking, editorial photo department	25,846,160	322,900	26,169,060
Color scanners and color separation equipment	12,557,845	23,082,210	35,640,055
Pressroom	374,912,590	11,323,200	386,235,790
Mailroom	118,309,821	7,603,500	125,913,321
Newsprint handling and warehouse equipment	16,834,133	660,850	17,494,983
Energy, power and security management systems	11,171,699	265,500	11,437,199
New telephone and radio systems	14,948,247	129,000	15,077,247
Transportation—automobiles and trucks	40,833,945	1,783,000	42,616,945
New furniture and office equipment	38,833,911	954,100	39,788,011
Newspaper vending machines	9,175,074	3,102,800	12,277,874
Commercial or job printing equipment	4,804,939	15,000	4,819,939
Waste Ink Reclaiming Equipment	2,436,420	30,000	2,466,420
Other	10,323,218	472,000	10,795,218
Subtotal	$901,655,932	$73,008,742	$974,664,674
Total Outlays	$1,446,573,369	$130,995,742	$1,577,569,111

[1] Figures represent only those ANPA-member plants reporting and not all daily newspapers

$97.4 million in 1987. Newspapers said they expect to spend $109 million this year for mailroom machinery.

- Front-end systems, including editorial, classified and display-advertising systems, cost respondents $110.2 million in 1988, nearly 10 percent more than the $100.3 million spent the previous year. Survey participants projected a decrease in '89 expenditures to $84.8 million.
- Hardware and software for business applications cost $76.3 million in 1988, a 57-percent jump from $48.5 million in 1987. Expenditures this year were put at $63 million.
- Spending for personal computers used internally by newspapers—for uses other than editorial, classified or advertising—decreased 15 percent in 1988 from $20.4 million to $17.4 million. A further decrease was projected for 1989, to $15.6 million.
- In one of two new survey categories, responding newspapers spent $5.9 million on desktop-publishing equipment for editorial, classified and advertising uses in 1988. They projected expenditures of $5 million this year.
- Bar-coding equipment was the survey's second new category. Respondents spent $1.3 million for such devices last year and said they would spend $538,245 this year.
- Newsprint handling and warehouse equipment expenditures were $17.5 million in 1988, up 24 percent from $14.1 million in 1987. A further increase to $19.6 million was projected for 1989.
- Expenditures for waste ink reclamation equipment were $2.5 million in 1988, a 92-percent increase from 1987's $1.3 million. A decrease to $757,005 was projected for this year.
- In the area of energy, power and security management, respondents spent $11.4 million in 1988, down about 2 percent from $11.6 million the previous year. Participants indicated there will be a greater decrease this year to $7.7 million.
- Spending for new furniture and office equipment totaled $39.8 million last year, up 17 percent from $34.1 million in 1987. A decrease in expenditures to $29.2 million was projected for '89.
- Color scanning and separation equipment are on something of a sales roller coaster. In 1988, $35.7 million was spent in that area, a 240-percent increase from $10.5 million in 1987. But a decrease to $14.7 million was projected for this year.
- The camera room, including platemaking and the editorial photo department, followed a similar pattern. Expenditures zoomed to $26.2 million in 1988, an 86-percent increase from the $14.1 million reported in the previous survey. Expected spending this year totaled $13.3 million. ☐

NEW

THE XIP 400/CG
IS A BETTER
VIDEOSETTER

- Save film and chemistry costs via plain paper output
- Up to 5 times faster
- Low entry cost
- Low maintenance costs
- Over 2000 fonts available
- *No* need to change your "Front-End"
- 11 x 17 inch (or) 8.5 x 14 inch output
- PostScript option

FULL VIDEOSETTER EMULATION

Also available for Unisetter 8400-8600

XITRON

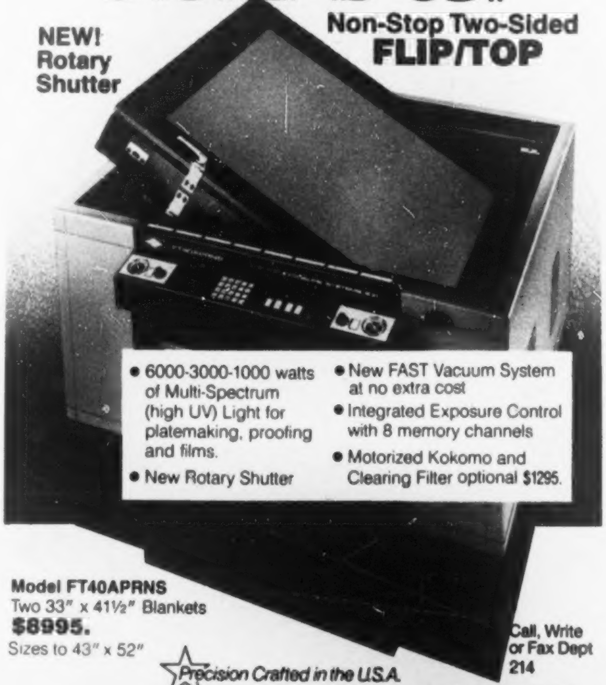
The Interface Professionals
. . .and more.
1428 EAST ELLSWORTH ANN ARBOR, MICH 48108
TELEPHONE (313) 971-8530 TELEX 234275

Visit us at ANPA/TEC® '89 Booth 5214

SYSTEMS 631

NEW! Rotary Shutter

Non-Stop Two-Sided FLIP/TOP



- 6000-3000-1000 watts of Multi-Spectrum (high UV) Light for platemaking, proofing and films.
- New Rotary Shutter
- New FAST Vacuum System at no extra cost
- Integrated Exposure Control with 8 memory channels
- Motorized Kokomo and Clearing Filter optional $1295.

Model FT40APRNS
Two 33" x 41½" Blankets
$8995.
Sizes to 43" x 52"

Call, Write
or Fax Dept
214

Precision Crafted in the U.S.A.

nuArc company, inc.
6200 W. Howard St., NILES (Chicago), IL 60648-3404
FAX 312/967-9664 312-967-4400

nuArc

Visit us at ANPA/TEC® '89 Booth 4016

4-month consumption by dailies is down

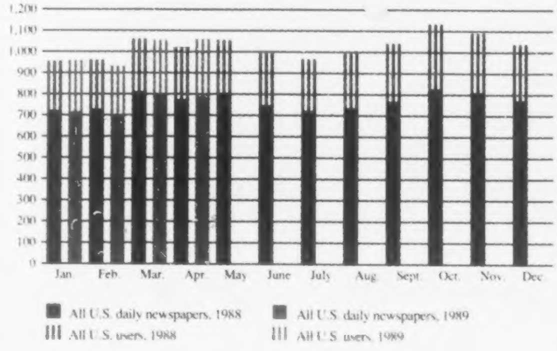
Newsprint consumption by all U.S. users totaled 1,060,376 metric tons in April, an increase of 3.6 percent from April 1988. An extra Sunday accounted for about 3 percent of the increase.

For the first four months of 1989, overall consumption was up 0.3 percent.

U.S. daily newspapers in April used 792,757 metric tons, 2.4 percent more than a year earlier. But for the four-month period, their consumption was down 0.7 percent.

Newsprint inventories for newspapers in ANPA's statistical sample averaged a 41-day supply, compared with a 46-day supply in April 1988. Stocks of North American mills were up 25 percent from April '88.

Canadian newsprint mills operated at 94 percent of rated capacity in April and at 96 percent for the year-to-date. U.S. mills operated at 97 percent and 96.4 percent, respectively.



Estimated newsprint consumption, 1988-1989 (thousands of metric tons)

Estimated consumption of all U.S. daily newspapers[1]

Region	February 1989(r)	February 1988	% Change
Northeast	170,838	184,731	-7.5
North Central	144,715	150,366	-3.8
South	221,319	227,621	-2.8
West	161,713	167,700	-3.6
Circulation Size			
up to 25,000	52,344	55,317	-5.4
25,001-100,000	152,631	154,687	-1.3
Over 100,000	493,610	520,414	-5.2
February totals	698,585	730,418	-4.4
Region	**March 1989**	**March 1988**	**% Change**
Northeast	188,580	200,684	-6.0
North Central	166,443	166,918	-0.3
South	257,914	250,576	+ 2.9
West	183,065	182,494	+ 0.3
Circulation Size			
up to 25,000	60,170	60,742	-0.9
25,001-100,000	173,703	167,938	+ 3.4
Over 100,000	562,129	571,992	-1.7
March totals	796,002	800,672	-0.6
Region	**April 1989(p)**	**April 1988**	**% Change**
Northeast	197,806	200,914	-1.5
North Central	167,547	155,627	+ 7.7
South	249,095	237,358	+ 4.9
West	178,309	180,328	-1.1
Circulation Size			
up to 25,000	58,577	58,812	-0.4
25,001-100,000	170,620	166,839	+ 2.3
Over 100,000	563,560	548,576	+ 2.7
April totals	792,757	774,227	+ 2.4
Four month totals	3,0[illegible]5,110	3,026,371	-0.7

Estimated consumption of all U.S. users

	1988	1987	% Change
January totals	962,781(r)	957,597	+ 0.5(r)
February totals	934,968(r)	963,880	-3.0(r)
March totals	1,057,099	1,059,279	-0.2
April totals	1,060,376(p)	1,023,484	+ 3.6(p)
Four month totals	4,015,224(p)	4,004,240	+ 0.3(p)

Production

	Canada	U.S.A.	North America
March 1989	806,272	468,485	1,274,757
March 1988	874,324	462,533	1,336,857
Increase	-68,052	+ 5,952	-62,100
decrease	-7.8%	+ 1.3%	-4.6%
April 1989	814,012	448,827	1,262,839
April 1988	826,229	450,934	1,277,163
Decrease	-12,217	-2,107	-14,324
	-1.5%	-0.5%	-1.1%
Four months 1989	3,247,955	1,781,147	5,029,102
Four months 1988	3,336,930	1,800,178	5,137,108
Decrease	-88,975	-19,031	-108,006
	-2.7%	-1.1%	-2.1%

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
March 1989	582,856	90,206	140,376	813,438
March 1988	638,803	108,080	134,216	881,099
April 1989	546,229	96,303	142,719	785,251
April 1988	575,697	100,344	112,567	788,608
Four months 1989	2,216,422	377,246	498,584	3,092,252
Four months 1988	2,337,548	398,410	431,376	3,167,334
Increase or	-121,126	-21,164	+ 67,208	-75,082
decrease	-5.2%	-5.3%	+ 15.6%	-2.4%
From U.S. mills				
March 1989	424,724		36,889	461,613
March 1988	435,564		22,653	458,217
April 1989	401,606		40,150	441,756
April 1988	419,755		26,318	446,073
Four-months 1989	1,596,179		155,566	1,751,745
Four-months 1988	1,679,934		96,483	1,776,417
Increase	-83,755		+ 59,083	-24,672
or decrease	-5.0%		+ 61.2%	-1.4%
From North American mills				
Four months 1989	3,812,601	377,246	654,150	4,843,997
Four months 1988	4,017,482	398,410	527,859	4,943,751
Increase or	-204,881	-21,164	+ 126,291	-99,754
decrease	-5.1%	-5.3%	+ 23.9%	-2.0%

Stocks

U.S. publishers[2]	Tonnage	Days' supply On hand	Days' supply In transit
February 1989	925,110(r)	39	5
February 1988	930,981	37	7
March 1989	889,250	36	5
March 1988	962,255	39	6
April 1989	850,042(p)	36(p)	5(p)
April 1988	971,780	40	6
Canadian mills			
March 1989	417,430		
March 1988	321,070		
April 1989	446,191		
April 1988	358,691		
U.S. mills			
March 1989	70,424		
March 1988	55,031		
April 1989	77,495		
April 1988	59,892		

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.

(r) = revised (p) = preliminary

NOTE

ONLY THE FOLLOWING PAGES OF THIS

PUBLICATION HAVE BEEN FILMED

Cov. 1, Pgs. 3, 4, 77

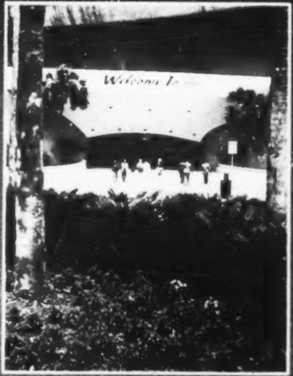
Future Is Bright
For Special Sections

July 1989

presstime

The Journal of the American Newspaper Publishers Association

NEW ORLEANS ANPA/TEC '89



NEWSPAPE
PUBLISHE
ANPA

presstime

INDEX

VOLUME 11, NUMBER 7 JULY 1989

ANPA/TEC Report *Choices. That's what faced the thousands who hit the floors of the New Orleans Convention Center and the nearby Rivergate Exhibition Center, where a dizzying array of newspaper equipment was housed for the Association's annual trade show. From personal computers to graphics systems to presses and output devices, newspaper people clearly had a host of options from which to choose. Five days of equipment scrutinizing were coupled with three days of workshops and sessions that covered the latest developments in newspaper operations.* **26**

Special sections *The phenomenon of the 1970s continues to expand in the late '80s as newspapers tune ever more finely into readers' interests.* **6**

Bargaining to impasse *It's replacing strikes as the consequence when labor and management reach irreconcilable differences.* **12**

Civilized competition *Executives of newspapers and the growing number of city and regional magazines see their territories as fairly well staked out.* **16**

Is the Black press bouncing back? *Long undermined by the struggle for advertising and top talent, some publishers see signs of better times.* **20**

Profile: Mike Soliman *This quintessential marketing man is molding The Globe and Mail of Toronto to serve upscale readers.* **50**

Essay: Healing forces *There's no salve as soothing to the oppressed as free speech, says Soviet journalist Sergei Grigoryants.* **52**

First Amendment rulings *The Supreme Court issued a string of decisions affecting news media, including libel and privacy rulings.* **56**

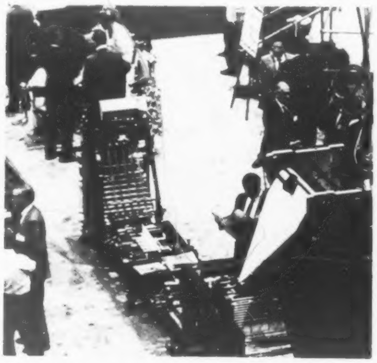
World press pow-wow *Publishers from 31 countries met in New Orleans to share ideas on how to tackle problems that confront all newspapers.* **58**

Hear this, management: *The staff in the newsroom wants better pay, benefits and working conditions.* **62**

Guild convention *The Newspaper Guild, ending a second straight year with a budget deficit, revised its dues allocation to beef up the general fund.* **78**

Going Dutch *When VNU of the Netherlands acquired Belden Associates, it rounded out a line of newspaper marketing services but evoked mixed feelings.* **89**

Special Sections, p. 6



ANPA/TEC Report, p. 26
(Cover photos by Maurice Fliess, C. David Rambo and Luke Ducote.)

Sports Review

The Black Press, p. 20

Advertising	70
Advertisers index	90
ANPA news, calendar	90-91
Books	69
Chairman's corner	4
Circulation	68
Education	66
Employee relations	78
Government affairs	54
Marketing	74
Minority affairs	59
Newspaper business	89
News-editorial	62
Newsprint	77
Overset	92
Research	61
Speeches	76
Syndicates	69
Technology	84
Telecommunications	60
World press	58

CHAIRMAN'S CORNER

Assessing the present, glimpsing the future

For more than 60 years our annual production management gatherings have been catalysts for technological advancement:

- In the '50s, photocomposition and computers
- In the '60s, offset, plastic plates and VDTs
- In the '70s, satellites and telecommunications
- In these '80s, flexo, PCs and soy-oil inks.

ANPA/TEC '89, with its more than 300 exhibits and challenging conference sessions, carried on the tradition. If you weren't able to be there, I urge you to read the full report in this presstime.

More than 13,000 of us gathered in New Orleans with questions about how we manage newspapering's future. We wonder how we can further improve editorial content, which is dramatically better than a decade ago, how to add more color, how to relate more closely to our communities, how to produce more efficiently and distribute more reliably, how to help our advertisers sell even more goods and services.

William H. Cowles 3rd

In answer to those questions, we found at least seven exhibits of PC color-picture desks. We saw keyless offset inking, waste-ink reprocessing systems and mailroom systems to handle 40 inserts. Conference presentations featured new approaches to customer service. Workshops explored new press techniques, and packaging and distribution systems.

We also considered longer-term industry needs as we face competition on both the marketing and the technological fronts.

Every newspaper's management team needs to pledge itself to increased penetration of its local market—more regular readers and more well-served advertisers.

Much more research and development is needed, both about our readers and advertisers and about our equipment and "tooling."

Full utilization of our renewable newsprint resource will make newspapers part of the waste-disposal solution, not the problem. We need to learn how to reuse it, how to recycle more of it, and how our newsprint suppliers can help.

All this does not lend itself to tinkering about the margins. It demands bold innovation, risk taking, investment in the future. Those of us who are successful will be offering not "traditional" products and services but "tailored" ones: tailored to provide the news our readers want, when and how they want it; tailored to reach the customers our advertisers want.

At ANPA/TEC '89 we continued to mesh the possible of the future with the practical of today. Conference sessions broadened our horizons and miles of exhibits offered us new ideas to reach confidently for those horizons.

Bill Cowles

William H. Cowles 3rd
ANPA Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Charlene Gridley
Circulation Manager, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport
Washington, D.C. 20041
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East/Southeast
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 401 Park Ave. South, New York, N.Y. 10016, (212) 545-5100
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601, (312) 977-1933
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067, (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041

BPA Presstime is a member of the Business Publications Audit of Circulation Inc.

1989 consumption continues to lag

Newsprint consumption by all U.S. users totaled 1,042,705 metric tons in May, a decrease of 1.5 percent from May 1988.

For the first five months of 1989, overall consumption was down 0.2 percent.

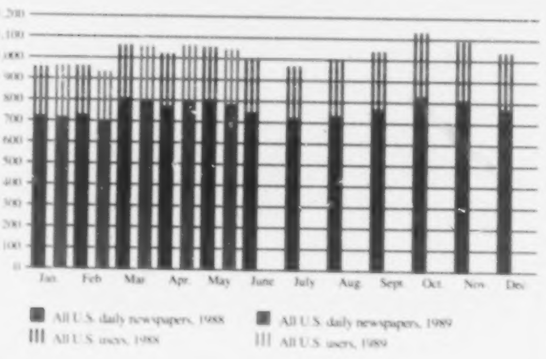
U.S. daily newspapers in May used 793,188 metric tons, 1.2 percent less than a year earlier when May had a fifth Sunday. For the five months, their consumption was 0.7 percent lower than in the year-earlier period.

Newsprint inventories for newspapers in ANPA's statistical sample averaged a 41-day supply, versus a 46-day supply in May 1988. Stocks of North American mills were about 19 percent higher than a year earlier.

Canadian newsprint mills operated 93 percent of rated capacity in May and at [illegible] percent for the year to date.

U.S. mills operated at [illegible] percent and 96.2 percent of capacity, respectively.

Estimated newsprint consumption, 1988-1989 (thousands of metric tons)



Estimated consumption of all U.S. daily newspapers[1]

Region	April 1989(r)	April 1988	% Change
Northeast	[illegible]	201,914	[illegible]
North Central	209,28[illegible]	[illegible]	[illegible]
South	[illegible]	237,356	[illegible]
West	[illegible]	169,328	[illegible]
Circulation Size			
Up to 25,000	[illegible]	158,472	[illegible]
25,001 - 100,000	172,194	[illegible]	[illegible]
Over 100,000	[illegible]	128,575	[illegible]
April totals	[illegible]	774,227	[illegible]
Four-month totals	[illegible]	3,129,437	[illegible]
Region	**May 1989(p)**	**May 1988**	**% Change**
Northeast	[illegible]	208,144	[illegible]
North Central	198,261	198,337	0.01
South	247,341	245,3[illegible]	+0.8
West	[illegible]	180,920	+0.8
Circulation Size			
Up to 25,000	[illegible]	111,481	[illegible]
25,001 - 100,000	[illegible]	[illegible]	[illegible]
Over 100,000	[illegible]	[illegible]	[illegible]
May totals	793,188	803,096	-1.2
Five-month totals	3,901,158	3,929,437	-0.7

Estimated consumption of all U.S. users

	1989	1988	% Change
March totals	1,013,697(r)	1,008,279	+0.5(r)
April totals	1,058,326(r)	1,015,484	+4.2(r)
May totals	1,042,705(p)	1,058,414	-1.5(p)
Five-month totals	5,090,579(p)	5,102,014	-0.2(p)

Production

	Canada	U.S.A.	North America
May 1989	838,086	457,453	1,295,539
May 1988	859,961	466,050	1,326,011
Decrease	21,875	8,597	30,472
	2.5%	1.8%	2.3%
Five months 1989	4,086,041	2,238,600	6,324,641
Five months 1988	4,196,891	2,266,228	6,463,119
Decrease	110,850	27,628	138,478
	2.6%	1.2%	2.1%

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
May 1989	570,943	106,795	173,079	850,817
May 1988	591,365	107,108	157,235	855,708
Five months 1989	2,787,365	484,041	671,663	3,943,069
Five months 1988	2,928,913	505,518	588,611	4,023,042
Increase or	-141,548	-21,477	+83,052	-79,973
decrease	-4.8%	-4.2%	+14.1%	-2.0%
From U.S. mills				
May 1989	419,319		43,080	462,399
May 1988	434,972		27,773	462,745
Five months 1989	2,015,498		198,646	2,214,144
Five months 1988	2,114,906		124,256	2,239,162
Increase or	-99,408		+74,390	-25,018
decrease	-4.7%		+59.9%	-1.1%
From North American mills				
May 1989	990,262	106,795	216,159	1,313,216
May 1988	1,026,337	107,108	185,008	1,318,453
Five months 1989	4,802,863	484,041	870,309	6,157,213
Five months 1988	5,043,819	505,518	712,867	6,262,204
Increase or	-240,956	-21,477	+157,442	-104,991
decrease	-4.8%	-4.2%	+22.1%	-1.7%

Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
March 1989	889,250	36	5
March 1988	962,255	39	6
April 1989	890,029(r)	36	6
April 1988	971,780	40	6
May 1989	838,155(p)	36(p)	5(p)
May 1988	951,494	40	6
Canadian mills			
May 1989	433,480	—	—
May 1988	362,944	—	—
U.S. mills			
May 1989	72,549	—	—
May 1988	63,197	—	—

[1] Based on unaudited data from newspapers in ANPA's statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA's statistical sample.
(r) = revised (p) = preliminary

A2350-2

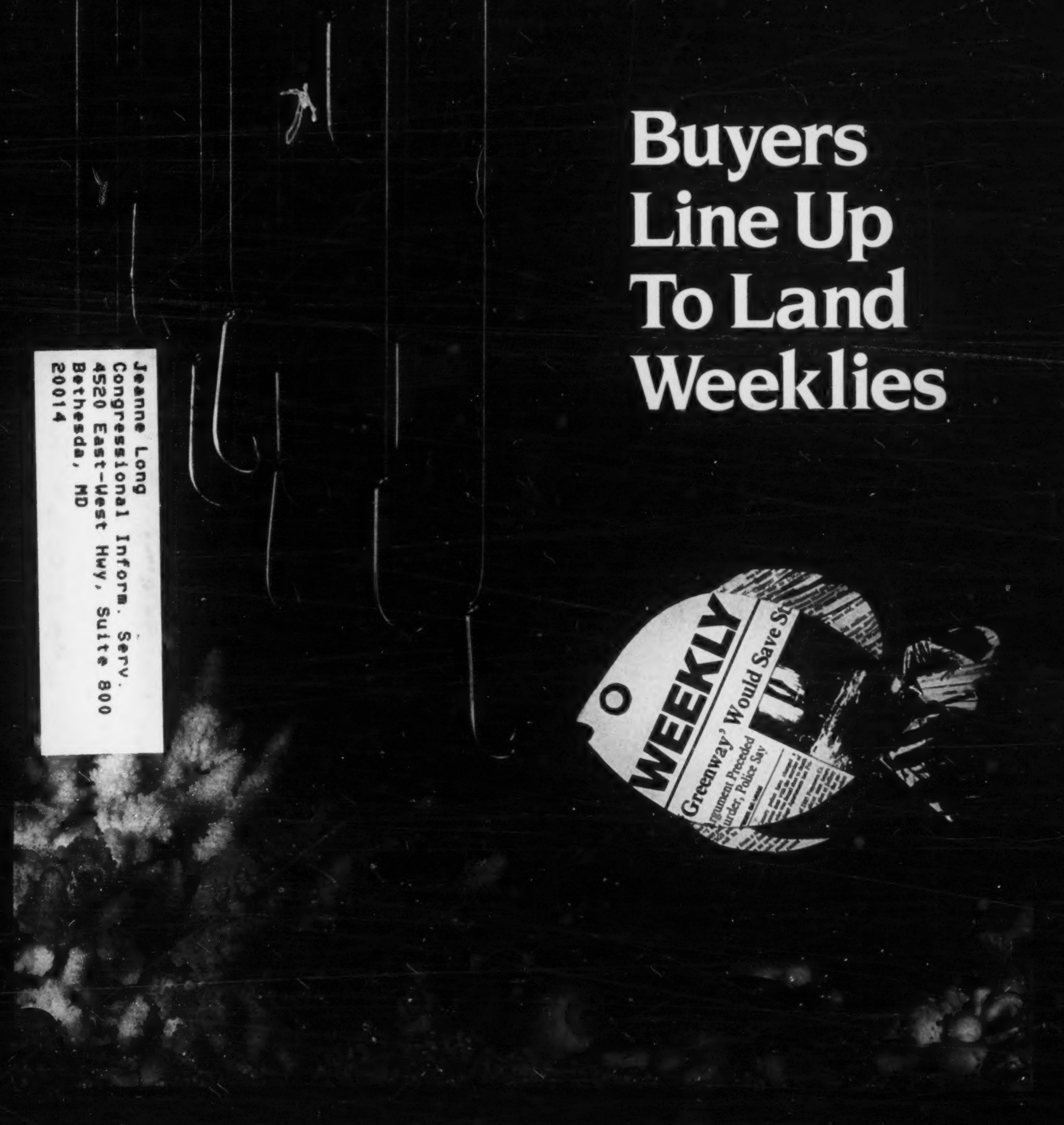
August 1989

presstime

The Journal of the American Newspaper Publishers Association

Newspaper Promotions: Saying It on Billboards

Buyers Line Up To Land Weeklies


WEEKLY
'Greenway' Would Save St
Argument Preceded
Murder, Police Say

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

presstime

INDEX VOLUME 11, NUMBER 8 AUGUST 1989

Special Report *Long left to the publishing entrepreneur with a lot of energy and only a little cash, weekly newspapers today are getting a second glance from the major leaguers. Many large newspaper groups, in fact, have found that small community papers offer handsome profits on relatively small investments. Weeklies have something else to offer: growing circulation. With interest running so high, they are fetching higher prices in the media marketplace. But publishing a weekly is not without its problems and challenges.* **20**

Roadside attractions *Newspapers are spending more money on a competitive advertising medium for their promotions—billboards.* **6**

Reaching out *As the numbers of Hispanics have swelled, newspapers are increasingly trying to win their loyalty.* **12**

Table manners *Editors need to be more mindful of charts and tables lest they find themselves publishing "misinformation graphics."* **15**

No vacancy *Other industries are having trouble drawing crowds to conferences and seminars, but not so the newspaper business.* **18**

Practical pondering *New Directions for News, a newspaper think tank, is encouraging industry leaders to bring fresh ideas to stale problems.* **28**

Essay: Weekly rewards *Carol Parafenko Kozak talks about the woes and wonders of starting a small weekly newspaper.* **31**

Profile: Bill Griffith *This former circus impresario has found running a chain of weeklies in Wisconsin a barrel of fun—and money.* **32**

JOAs under scrutiny *ANPA tells Congress that most members support the Newspaper Preservation Act, and that the law is still needed.* **34**

Kenaf mill in limbo *A long-planned kenaf newsprint mill is on hold indefinitely because of the soft newsprint market.* **46**

Payday trends *A 1989 survey shows increases in the average base salaries for all top newspaper management positions.* **50**

No optical illusion *Rewritable optical disks are on the market offering newspapers vast, changeable storage capacity.* **54**

New York's Hometown Paper
DAILY NEWS

Newspaper Billboards, p. 6

WEEKLY
'Greenway' Would Save St
Argument Preceded
Murder, Police Say

Weeklies, p. 20
(Cover photo by Peter Gridley.)

Serving Hispanics, p. 12

Advertisers index 63
Advertising 44
ANPA calendar 61
Chairman's corner 4
Circulation 48
Education 40
Employee relations 50
Government affairs 34
Letters 63
News-editorial 43
Newspaper business 62
Newsprint 46
Overset 64
Postal 42
Readership 45
Research 49
Speeches 60
State and local 42
Syndicates 43
Technology 54
Telecommunications 42

CHAIRMAN'S CORNER

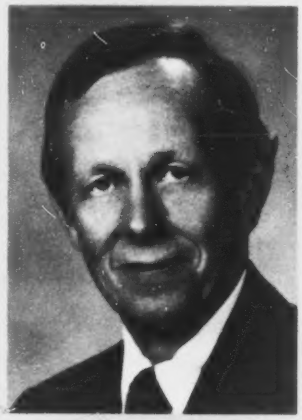
Give congressmen your views on telecommunications policy

You have been hearing quite a bit lately about telecommunications policy. First it should be said that the traditional newspaper product remains strong. Tremendous business opportunities, however, are emerging for newspapers and others to deliver information by telephone lines. Information providers in the future must make greater use of the local telephone network because that network is the only way to provide two-way rapid communication into most homes and offices.

ANPA continues to believe that the owners of these monopoly lines should not own or control the content that moves through their lines. In other words, the seven regional Bell operating companies should be encouraged to provide the means by which the greatest diversity of information can flow to the American people. That's in the public interest.

Secondly, the only "law" affecting electronic publishing today is the 1982 consent decree that broke up AT&T and prohibits BOC entry into the information-provider business. U.S. District Judge Harold H. Greene's decision prohibits local phone companies from having any financial interest in information traveling over their own local phone lines.

Thirdly, Congress is very interested in reasserting jurisdiction over the telecommunications policy. That makes good sense.


William H. Cowles 3rd

Now we are asking you to get involved. The newspaper business simply seeks a level playing field in the delivery of information over local phone lines. That can't happen if the monopoly owners of the phone lines are allowed to offer telephone-delivered content. New communications technology quickly will open entrepreneurial opportunities. The owners of the ball park, the BOCs, can and should open their gateways, promote them heavily, attract hundreds of independent content providers and have no reason to tilt the playing field in anyone's favor. Government regulation of the playing field simply won't work. By the time we get to Washington to complain or go to the courts or the Federal Communications Commission, the marketing game will be lost.

But let's not lose track of the fact that our relationship with the regional telephone companies is complex and evolving. They have been our close partners in the past and undoubtedly will be in the future. We in the newspaper business and others already are offering services via gateways they have deployed.

So I am asking each of you to meet with your elected congressional representatives. Let them know your views on phone company entry into electronic publishing and seek their support for a policy that keeps *content* and *conduit* separate. Do it now. Do it in person. And send us a report. ANPA's Legal and Government Affairs Department can provide you with any further background you may need.

Bill Cowles

William H. Cowles 3rd
ANPA Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Charlene Gridley
Circulation Manager, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley
Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport,
Washington, D.C. 20041,
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East/Southeast
Dave Bentley, Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 401 Park Ave. South, New York, N.Y. 10016; (212) 545-5100
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601; (312) 977-1933
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067; (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA **Presstime** is a member of the Business Publications Audit of Circulation Inc.

Weeklies Become A

Relatively low purchase prices, high rates of return and growing circulation

BY ROLF RYKKEN
presstime staff writer

In Ohio, the owners of six groups of weeklies have a standing order of their press association: Tell us about any weeklies up for sale.

Such instructions are commonplace in the newspaper business today, and they emanate from groups of dailies as well as weeklies.

Weekly newspapers, whose combined circulation has nearly doubled since 1970, have become the popular media purchase for many large newspaper groups searching for readers, for small weekly groups wanting to grow, and for investors looking for handsome profits on relatively small investments. Weeklies—the word is broadly applied to papers published no more than three times a week—are also probably the last avenue for the publishing entrepreneur with a little cash and a lot of energy.

About five years ago Bolitho Sterling Newspaper Service of Kansas City, Mo., broke down its brokerage sales of weeklies this way: 80 percent to individuals and those already owning a handful of papers, 20 percent to larger group owners. Now, reports Robert N. Bolitho, the ratio is 60:40.

Says L. Mark Stone, executive vice president of Henry Ansbacher Inc., a New York City-based investment banking firm that specializes in newspaper acquisitions, "We've got a lot more weekly deals on the books waiting to get done than we have had in the past. . . . There is a clear feeling that the level of activity and interest in weeklies is up considerably this year over last year. It's the highest we've seen."

Before casting their lines in the weekly pond, the buyers are baiting their hooks with traditional bank financing or in some cases with venture capital from investors who previously fished for large daily papers, radio stations and cable television outlets. "You can get in for $2 million instead of $22 million," says James P. Rutherfurd, vice president/media group for First Boston Corp. investment bankers.

With interest so high, weeklies are commanding higher prices in the media marketplace, according to Peter J. Campbell, an investment associate with Burr, Egan and Deleage venture capitalists of Boston and San Francisco. Concerned that the prices for weeklies will continue climbing, Campbell says, "Our goal is to get in early on."

Edwin W. Tucker, general manager of the New Jersey Press Association, can plainly see the higher level of acquisition activity among weeklies in his state. "These papers are being sought, and what you pay for them depends on how much you want them," he says. "I've had a number of inquiries on what's available. Before, the seller had to look for a buyer. Now, sellers have two and three people they're dickering with."

Magazine Publisher Malcom S. Forbes Sr. and his son, Malcom S. Forbes Jr., are well aware of this. Their 2-year-old newspaper company had an agreement to purchase a small New Jersey weekly earlier this year in the town of Lambertville, but then three other bidders came in with higher offers and the eventual group buyer "paid an extremely high price," says the younger Forbes, chairman of Forbes Newspapers. "We scratched our heads and said, 'Why Lambertville?' " Answering his own question, he says it was because the chances for success in the weekly arena "are enormous."

Phillip J. Meek, president of the publishing group of Capital Cities/ABC Inc., which acquired its first weeklies 10 years ago and now has 48, is puzzled by the sudden interest in weekly enterprises. In the right market, he says, they have always been good investments. "I don't see where there is anything changed," Meek says.

Weeklies, both paid-circulation and free-circulation, have become all the rage because:

- There are nearly five times as many weeklies as dailies—7,606 versus 1,643 as of the end of last year. Moreover, far more of the weeklies are independently owned and thus more susceptible to acquisition. There are just 400 independent dailies left in the United States. But the National Newspaper Association, which represents many weekly and some small-daily papers, estimates there may be as many as 2,500 independent weeklies.
- Dailies can cost as much as four to five times annual gross revenues. The formula for weeklies is about half that.
- Weeklies can be lucrative. Depending on the market, profits of from 20 percent to 30 percent are possible. Especially desirable are suburban weeklies.
- They're popular—with readers seeking the minutia of neighborhood news, and with advertisers looking for affordable space.
- They're the last hope for the would-be publisher who is willing to apply personal savings to the purchase of so-called desktop-publishing equipment—personal computers and a laser printer—to launch a newspaper.
- Some larger weeklies have the potential to go daily. This step can significantly increase revenues and equity.

Weeklies have something else to offer: growing circulation.

Unlike daily papers, whose total circulation has been virtually stagnant for many years, weekly newspaper circulation has been escalating. Since 1960 it has climbed 152 percent, while that

Sought-After Catch

are attracting all kinds of investors—from big groups to small entrepreneurs

of dailies increased just 6.9 percent.

A major reason for this growth is the strong pull of a weekly newspaper's chief asset—truly local news that is often clipped out of the paper, stuck to the refrigerator door with a magnet and eventually placed in a scrapbook for posterity.

Large and medium-size dailies simply aren't as adept as weeklies at providing detailed local coverage, says Gary Hurt, president of Hurt Publishing Co. in Bellvue, Ohio, which owns nine weeklies. "They don't seem to grasp that market as well. Thank goodness," he says.

"I think (he's) right," responds Jack Driscoll, editor of The Boston Globe, which like many big-city dailies faces intense competition from pesky suburban weeklies as well as some suburban dailies. "Even the suburban dailies can't match the weeklies in their own communities," Driscoll asserts.

But while weeklies may be becoming hot properties, they are not without problems and challenges.

Many are feeling the effects of the same thing that ails other media—competition for readers' time and advertisers' money.

Some strain to attract or retain reporters and advertising salespeople, drawn as they are to larger markets where better salaries and greater career opportunities may be found.

And in smaller towns, weekly editors sometimes have to perform a delicate balancing act between editorial integrity and advertising necessity.

Despite these drawbacks, though, weeklies continue to be alluring—even for those who thought they had bade farewell to the newspaper business.

In 1978, Bill Griffith and his wife, Dolores, sold their four weeklies and two advertising shoppers near Madison, Wis., for a healthy price, and retired. But after five years of retirement "boredom," they re-entered the field and now have a new string of 13 weeklies. "And we're small potatoes in the weekly business," Griffith says. (See profile, p. 32.)

THE BUYERS. Joining Griffith in the weekly market are other small intra-state or regional weekly newspaper groups, the budding entrepreneur and the major leaguers—the large media companies. (See chart, p. 22).

Some of the most active big buyers include Gannett Co., Ingersoll Publications Co., Harte-Hanks Communications Inc. and Hollinger Inc. The latter company, based in Toronto and headed by media mogul Conrad Black, has amassed 105 U.S. weeklies and 31 Canadian weeklies in less than three years.

Other buyers include smaller groups such as Bee Newspapers of suburban Buffalo, Bee Publishing Co. of Newtown, Conn., Taylor (Texas) Newspapers Inc. and News Publishing Co. of Rome, Ga., and investors from such firms as Butcher Direct Investments of Philadelphia and Burr, Egan and Deleage.

As a rule, buyers are paying higher prices today than two years ago, says Charles J. Carey, assistant vice president for Henry Ansbacher Inc. The number of weeklies sold for more than $1 million rose from nine in 1987 to 13 in 1988, he says, and a further increase is likely this year.

Generally, industry observers say, the rule of thumb is for a weekly to sell at a multiple of 1-to-1½-times its annual gross revenues.

This was the case with the sale in April of Flushing (N.Y.) Tribune Inc., a group of six weeklies, which was sold for $2.8 million by Gary Ackerman and Michael Schenkler to News Communications Inc. of New York City. The papers' 1988 revenues were $1.7 million.

But lately, depending on the economics of a particular region and the potential for growth, some buyers have been paying twice gross revenues, or even more. According to the Ansbacher firm, it represented Mariner Newspapers of suburban Boston in a sale last March to Capital Cities/ABC Inc. for about twice gross revenues. The exact selling price for the 18 weeklies was not disclosed.

If someone wants a weekly or group of them badly enough, he or she will pay what is necessary, "especially if the area is really moving," says W.J. Brehm, chairman and president of Brehm

WEEKLY
'Greenway' Would Save St
Argument Preceded
urder, Police Say

Peter Gridley

Communications Inc. in Rancho Bernado, Calif., which publishes 30 weeklies and five small dailies.

If a for-sale weekly is in an area that is suffering economic woes, such as the oil-producing states of Texas and Louisiana, or in an area that is losing population as are some central and mountain states, it might go begging for bidders, reports broker Bolitho. Bright spots, he says, can be found in eastern, western and southeastern states.

For investment advisor Campbell, his bright spot is California. He says his firm intends to invest about $2 million to $5 million in each of two weeklies it purchased there about two years ago. His company, Burr, Egan and Deleage, may invest as much as $20 million to expand its holdings of weeklies over the next several years.

Burr, Egan and Deleage is one of the companies that gravitated toward weekly purchases as prices soared for other media like radio, cable television and broadcast television. Another is Butcher Direct Investments, whose two weeklies, purchased last year in the South, are its first.

What has confounded Butcher Vice President Howard E. Verlin is a persistent "lack of respect" for weeklies as investment opportunities. "But when you can pay 2 to 3 times gross revenues for a weekly instead of the 4 to 5 times gross you would for a daily, and you achieve the same profit margin, I'm not sure I see the difference," he says, adding, "A dollar is a dollar."

Verlin says the belittling attitude among some investors and buyers is changing. "Other venture capitalists have expressed an interest about getting into the field," he says. "It doesn't take much. If one or two people do well, I feel a lot of others will want to get into it."

The buyers, big and small, are pursuing each permutation of the weekly newspaper: paid weeklies that dominate their markets; groups of suburban weeklies that ring big metropolitan areas and give the metro dailies competitive headaches; county-seat weeklies that have the potential to be converted to dailies, significantly increasing their financial potential; and neighboring weeklies whose coalescing would give a common owner wider audience reach for regional and even national advertisers.

Number of Weeklies Owned By Major Daily Newspaper Groups

As of:	Dec. 31, 1970	June 1, 1989
Gannett Co.	12(1)	35
Knight-Ridder Inc.	6	2
Tribune Co.	n/a	12
Dow Jones & Co.	0	8
Thomson Corp. (Canada)	13	12
(United States)	2	24
The New York Times Co.	0	9
Scripps Howard	0	13
The Hearst Corp.	n/a	3
MediaNews Group	n/a(2)	17
Ingersoll Publications Co.	n/a	150
Freedom Newspapers Inc.	0	1
Capital Cities/ABC Inc.	2	48
Donrey Media Group	n/a	73
The Copley Press Inc.	20(est.)	35

(1) 1969 figure

(2) company founded after 1970

Note: Of the 20 largest newspaper groups in terms of U.S. daily circulation, the following own no weeklies: Newhouse Newspapers, The Times Mirror Co., Cox Enterprises Inc., News America Publishing Inc., Central Newspapers Inc. and The Washington Post Co.

Here are some examples of recent purchases, large and small:

- Ingersoll purchased 80 percent of Chanry Communications Ltd. of Farmingdale, N.Y., in 1987. Two months ago Chanry upgraded its 80 free newspapers and now devotes 35 percent of their content to local news. Being published under the common name of This Week, the papers claim a combined circulation of 1.1 million and are challenging Long Island's dominant daily, Newsday, for news and advertising.
- Adams Communications Corp., a Minneapolis publisher of 10 consumer magazines, purchased two weeklies in suburban Detroit and two in Southern California in 1988, in addition to starting one in Southern California.
- Chicago Sun-Times Inc. has emerged as a major publisher of weeklies in the Chicago suburbs. Last January the company that publishes the Chicago Sun-Times bought the 39-member Pioneer Press group and a month later started four other weeklies in suburban Chicago. It also owns Star Publications, publisher of 18 suburban Chicago semiweeklies.
- Last year, News Publishing Co. in north Georgia acquired The Cedartown (Ga.) Standard, a weekly. The company's media mix now consists of five weeklies, seven shoppers and one daily.
- Guy Gannett Publishing Co., owner of several news outlets in Maine including the Portland dailies, in 1987 purchased Minnesota Suburban Publications and its 27 community weeklies in the Minneapolis area. (See map, facing page.)
- Forbes Inc., publisher of Forbes magazine, purchased the eight-member Somerset Newspapers weekly group in Somerville, N.J., in 1986, and started two other weeklies by late 1988 when the group was named Forbes Newspapers. This year it launched its 11th weekly.

These high-level deals notwithstanding, industry observers say there's still a place in the weekly newspaper business for the little guy. States such as New York, New Jersey and Florida have seen the number of weeklies increase in 10 years, according to their state press associations, who credit the growth in part to spurts of entrepreneurial activity [**presstime**, June 1989, p. 24].

Florida, for example, now has 150 weeklies, 30 more than 10 years ago, according to Richard D. Shelton, manager of the Florida Press Association. "Desktop publishing has liberated the (weekly) business," he says.

Five of six weekly startups in West Virginia over the past five years were desktop operations, says William F. Childress, executive director of that state's press association.

A person can enter the field by spending $12,000 for two PCs and a plain-paper printer, Childress says, in contrast to the $45,000-plus that conventional phototypesetting equipment would cost. One study concluded that the desktop operator can also save $20,000 in materials and 25 percent in labor costs, he says.

"The only entry level left for the entrepreneurial person—unless he has very deep pockets—is at this (desktop publishing) level," says Richard D. Sanford, president of Catskill Mountain Publishing Corp. in Cobleskill, N.Y, which publishes four weeklies.

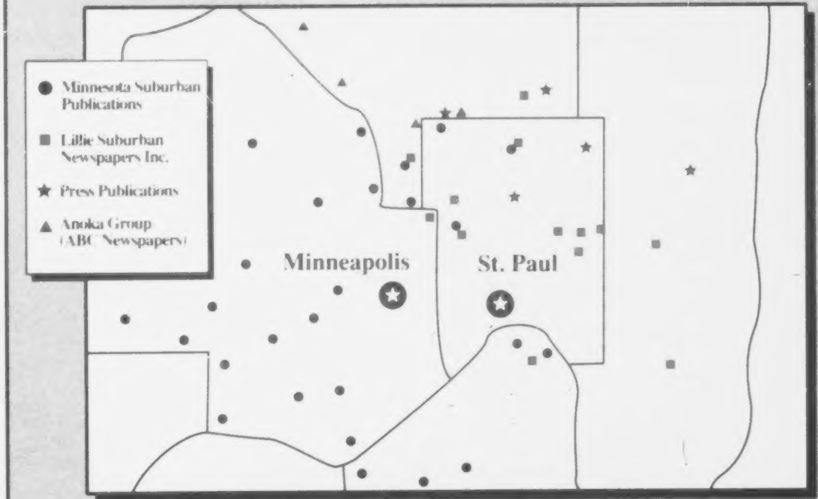
Sanford says that's probably how he would enter the weekly business today were he not already running his family-owned operation. "Today it makes more sense for a young entrepreneur to start up a paper" rather than buy an existing one, he says. He advises, "Find a market that's not well-served by a daily or weekly and start it."

THE WEEKLY NICHE. The weekly newspaper has been the one constant in U.S. journalism since the first one began coming out regularly in 1704—14 years after the first colonial newspaper, Publick Occurrences Both Forreign and Domestick, was suppressed by government authorities after its inaugural edition. (The first U.S. daily didn't appear until 1775—after converting from tri-weekly.)

Early U.S. weeklies took hold in rural areas when printers who trained in one town moved on to another and set up their own papers, often with the financial and moral encouragement of their previous publishers, Frank Luther Mott wrote in *American Journalism*. By 1870 the number of U.S. weeklies had grown to 4,000, and it peaked at 14,500 in 1914, according to Mott. After that the number began declining because of failures and consolidations.

Through their history, weekly newspapers have adhered to similar editorial formulas, Mott wrote. The crime and scandal journalism of big-city dailies has been eschewed in favor of "more kindly and matter-of-fact (reporting) of social events, community enterprises, crops, visiting, sickness, births, weddings and deaths."

Weeklies Surround Dailies' Domain


● Minnesota Suburban Publications
■ Lillie Suburban Newspapers Inc.
★ Press Publications
▲ Anoka Group (ABC Newspapers)
Minneapolis
St. Paul

Al Pacheco

One of the many metro areas encircled by suburban weeklies is Minneapolis-St. Paul. Four different groups publish 48 weeklies there.

And local news remains the weeklies' bread and butter.

"Weeklies have this unique place in the market," says Hamilton W. Meserve, president of the New York Press Association and owner and co-publisher of the Taconic Press, a group of eight weeklies in Dutchess County, N.Y. "As long as they cover their communities, they're untouchable. The dailies don't have the resources to cover the small towns," he says. "As long as you do that and do it well, you're pretty safe from attack. That's the niche we have to jealously guard."

Readers often consider weeklies an important part of their lives, comments Lee Canning, vice president of Minnesota Suburban Newspapers. "They say, 'It's our paper,' and that's not an unexpected development if you provide a sound news product because you're covering events that are very close to the average citizen," he notes.

Investment associate Campbell describes the weekly niche of "pure local news" as being attractive to readers and, consequently, to advertisers. As he travels nationally, Campbell reads the local papers and keeps his eyes open for acquisition prospects. "Sometimes it's hard to tell the dailies apart" from one city to another, he says. "You do (see a difference) with the weeklies. You get a sense of the community."

That "community" may be suburban, within a reasonable commute of a major metropolis; or it may be rural, where the tallest building for miles around is a grain silo.

On the surface, there would seem to be a world of difference between these two kinds of weeklies. The suburban paper would be inclined to focus on growth-related problems such as increasing development, growing traffic congestion, spreading crime and overcrowding of schools. The county seat or country weekly would tend to report the milestones in peoples' lives—births, weddings, social comings and goings, deaths, box scores of local sports contests—plus local government news.

But whether the coverage area is metropolitan subdivisions or sparsely settled hinterlands, "There is not a whole lot of difference between the two" kinds of weeklies, says Thomas F. Bradlee, president of the National Newspaper Association and president of Chesapeake Publishing Corp. in Elkton, Md. Bradlee, whose company publishes 24 weeklies and two dailies, says the weeklies' major purpose is to cover the news closest to home.

No national readership surveys have been conducted about weeklies, but the Newspaper Advertising Bureau has attempted to find out how much they are read by people who buy daily newspapers.

In a 1987 study, NAB found that 39 percent of daily newspaper readers had read a paid-circulation weekly in the previous week, while 55 percent of those with access to a free weekly said they read or at least looked at one.

The Consumer Data Service of the Oklahoma Press Association conducted readership surveys for five state press associations in addition to its own during the past two years. The results indicated a fairly wide range for weeklies' readership: from 32 percent of those surveyed in Oklahoma (excluding Tulsa and Oklahoma City) to 61 percent in Minnesota (excluding Minneapolis and St. Paul).

Industry observers say weeklies are popular with many advertisers because they pinpoint smaller audience segments and because they usually offer lower advertising rates than dailies do.

In 1987 a New Jersey daily, The Record of Hackensack, decided to determine how much its display advertisers were also buying space in weekly papers. The Record found that its advertisers use weeklies and shoppers 67 percent of the time—almost as often as they do the daily (73 percent).

The survey confirmed the "crossover" use by small advertisers of both kinds of newspapers, says Edward Efchak, manager/research and planning for The Record. "Looking across (other) markets, you'll find that the weekly is a big player" for advertising, he says.

Some daily publishers are still inclined to disregard weeklies as competitors for readers and advertisers, but they do so at their peril, warns G. Scott Christman, vice president of sales and marketing for Long Island's Chanry Communications. "If we had a product that wasn't read, we'd be out of business," he says. "Advertisers wouldn't stay with us if we didn't work."

PUBLISHING PROBLEMS. Some weeklies and advertisers can have a curious relationship, says Burgett H. Mooney III, president of News Publishing Co. of Rome, Ga.

"The biggest surprise when you go into weeklies is the amount of influence the advertiser tends to wield. They don't do that with the daily," says Mooney, whose company owns both kinds of publications. "The independently owned weekly is under tremendous pressure. He (the publisher) can look at his books and see maybe three people who are paying his way. . . . So he has to be real careful about" possibly offending key advertisers.

"I don't know why everyone thinks weeklies have it easy," Mooney says.

Similarly, George J. Measer, publisher of the 11-member Bee Group Newspapers in the Buffalo area, comments, "Some people see running a weekly as looking out the window watching the cows munch on the grass. It isn't so. In the suburbs you're dealing with the dailies, the shoppers, the TMCs (total-market-coverage publications), and radio and TV . . . and you're always turning over sales and editorial people."

Generally, says Meserve of The Taconic Press in New York state, weeklies ought "to be upbeat and positive about the community. People get enough bad news from the dailies and television, so they expect the weekly to be supportive."

But he also asserts, "You have to keep your powder dry." Meserve's group chose to fight one recent battle and, as a result, lost legal advertising from a school district. The newspapers editorially supported a federally subsidized housing project that was being opposed by school officials. "You have to be prepared to (take a stand)—just not every week," Meserve says.

A number of weekly newspapers have had a long history of editorial courage—and have paid a price. One well-publicized episode earlier this year was the firebombing of The Riverdale (N.Y.) Press. The attack was widely believed to be in retaliation for an editorial critical of bookstores that yanked from their shelves copies of the controversial novel *The Satanic Verses*.

Yet the image held by many journalism students—that of the old-fashioned weekly produced by one person wearing a green eyeshade and writing about the local crop forecast—seems to linger on, say Meserve and others.

Few journalism students look upon weeklies as a desirable place to start their careers, says Garrett W. Ray, a former weekly editor and now associate professor of journalism at Colorado State University. "Most want to start on the big dailies, and that's not a realistic expectation," he observes.

When recent graduates consider jobs in the newsrooms or advertising departments at weeklies, it is usually at papers published in the suburbs, says Leonard W. Lanfranco, executive director of the Oregon Newspaper Publishers Association and past chairman of NNA's Journalism Education Committee. A

This Fast-Growing Suburb of Washington, D.C., Supports

BY CHRISTOPHER M. CHANGERY

In the midst of the explosive suburban development around Washington, D.C., is a former farming town centered around a historic rail depot that hasn't seen a train in 21 years.

And while Herndon, Va., clings to its century-old heritage, it was recently identified by The Wall Street Journal as the fourth fastest-growing area in the United States. It is also one of the most competitive towns in America from the standpoint of community journalism.

Herndon—an incorporated town of 15,030 and surrounding areas with a Herndon postal address that swell the population to 50,000—has four free-circulation newspapers that concentrate on local news.

In response to the obvious question—What is it about Herndon that leads four different companies to publish papers there?—newspaper executives cite the town's rapid growth and the fact that, unlike most other communities in the region, it has its own, news-generating government.

The growth has attracted numerous merchants who find the weekly and biweekly local papers a more efficient way to advertise than the dailies that circulate in the town—The Washington Post, The Washington Times and The Fairfax Journal.

And as the town expands, so has the sense of community among its residents, says Kate McKenna, editor-in-chief of a group of papers that includes the Reston/Herndon Gazette. She explains that the surge in residential and commercial development has inspired citizens to bond together in an effort to maintain some sort of cohesive identity.

McKenna says it was the dailies' inattention to Herndon news that opened the door for the non-dailies. In April her paper became the latest to pass through that door.

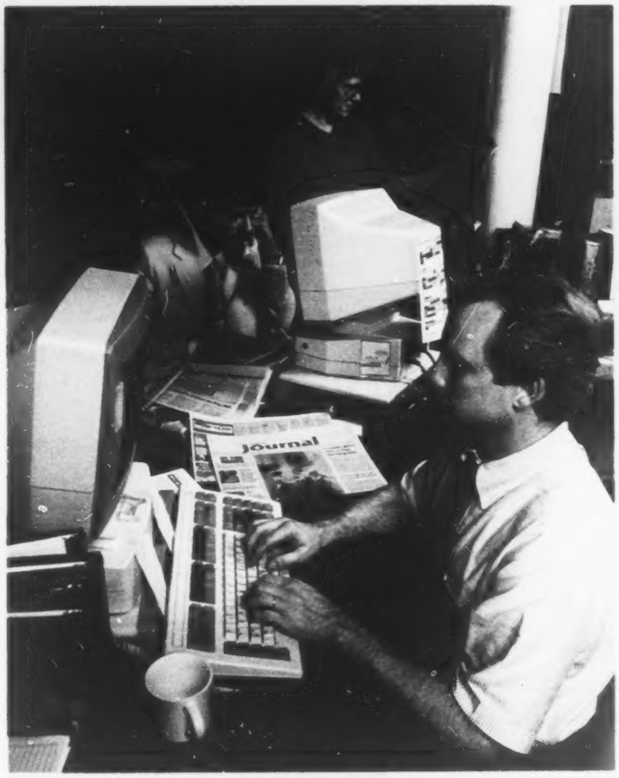
This craving for more local coverage was the reason Peggy D. Vetter started The Herndon Observer, the town's oldest paper, in 1976. She went to

Christopher M. Changery

town hall meetings and heard the laments of council members who said there was no way to communicate with citizens. When an important issue came up, garbage collectors were asked

Changery, a rising senior at Duke University in Durham, N.C., is a summer intern at presstime.

Webster Hawkins, publisher of the Osawatomie (Kan.) Graphic, oversees what he calls an old-time country weekly.



In contrast to Osawatomie, there is nothing "old time" about the Ingersoll-owned Suburban Journals that ring St. Louis.

Four Free Weeklies That Stress 'Local, Local, Local' News

to deliver flyers to every house.

Vetter says the Observer began as a biweekly with herself as the only staff member and just two regular advertisers. The paper, which went weekly in 1981, now has a circulation of about 17,000, she says.

What kind of coverage do the residents get now from their weeklies? "It's what I call local, local, local," says Peter M. Arundel, vice president/general manager of the Fairfax Division of Arundel Newspapers, which includes The Herndon Times.

While its three competitors have tabloid formats, the 15,985-circulation, weekly Times, now in its sixth year of publication, is a broadsheet. Arundel says the emphasis is on hard news, and the paper's editorial strategy is "continued commitment to probe deeper into the community. With that we will grow."

Commitment to the local community is also important to Tom Grubisich, publisher and editor of The Connection of Herndon, part of another group of suburban weeklies. He says the first time The Connection began circulating in Herndon the paper had to "pull back" because it could not afford to provide the breadth of local coverage people demanded.

On the second try, in 1986, The Connection had the wherewithal to cover Herndon "in a very physical way," opening an office there, Grubisich says. Herndon circulation of the paper now stands at 8,200.

McKenna says that even with The Herndon Observer, The Herndon Times and The Connection on the scene, The Gazette received a warm welcome this year when it became the "freshest face in Herndon."

"People were excited about the new paper," she recalls. "They said, 'There is so much that isn't covered.' The response was very good."

The Gazette was recently purchased by Atlantic Publishing Inc. of Cincinnati, which also publishes the Northern Virginia Sun of Arlington, and McKenna says she believes changes will be coming to The Gazette.

Unlike its three competitors, which are published weekly and home-delivered, The Gazette comes out once every two weeks and is bulk-delivered to stores for pickup by shoppers. It claims a circulation of about 10,000.

McKenna says the paper compensates for its less-frequent publication schedule by writing features about local events that go beyond the obvious news angle and obtain a larger shelf life.

Another difference is that the same edition of The Gazette serves the next-door town of Reston, Va. Arundel Newspapers and the Connection Group publish separate editions for Reston, and The Herndon Observer has only a minor presence there.

Views on who is on top in Herndon vary in predictable fashion.

Arundel says the Times is "very strongly" holding its own on the editorial and advertising fronts and is "waiting to see who shakes out." Grubisich calls The Connection "the dominant paper in Herndon." At The Gazette, McKenna says, "We are going head-to-head" with the competition. And Vetter says the Observer is continuing to do what it has done for 14 years: give Herndon residents the nitty-gritty details of what's happening in their hometown.

suburban weekly can be viewed as a steppingstone to a metro daily, he says, adding that the suburbs offer a lifestyle that young applicants might find more appealing than that of a remote village.

Weekly newspapers employed just 5.6 percent of the 1988 journalism school graduates, according to Lee Becker, professor of journalism at the Ohio State University School of Journalism, which annually conducts a survey of J-graduates for the Dow Jones Newspaper Fund.

According to Becker's study, weeklies paid the newly graduated journalism majors about $275 a week, up from the $249 in 1987. By comparison, daily newspapers paid starting salaries of $325 a week last year, up from about $265 in 1987 [**presstime**, June 1989, p. 70].

The Taconic Press' Meserve took an unorthodox approach to the compensation problem. He bought an old rooming house in well-to-do Dutchess County to serve as a low-rent apartment dwelling for four editorial and advertising staff members right out of school.

But some weeklies believe that their compensation woes, while serious, are less pressing than the general readership difficulties that face the entire industry. Like their counterparts in daily newspapering, weeklies are in a struggle to win the time and attention of an increasingly busy general public.

W.W. Anderson, president of Forbes Newspapers, points out that while a free weekly can claim 100-percent household penetration because of its saturation distribution, there is no guarantee that everyone sits down to read the paper.

Anderson calls this the "Yuppie problem." He says, "We've got people in townhouses and condominiums, they don't even

America's Heartbeat Is Heard at Rural Weeklies

BY MIKE FEINSILBER

A Texas teenager getting ready for the Junior Livestock Show had some thoughts about petulant porkers. "Raising a pig is good fun, but how much fun depends on the mood of the pig," Jenny Haley told the Anvil Herald of Hondo.

A great-grandmother in West Virginia, egged on by a granddaughter-in-law, finally got around to earning a high school diploma. "I dreaded math the most," Dorothy Johns, 71, of Gay, W.Va., told the Ravenswood News.

So it goes in the American countryside. While Washington concerns itself with the national debt and nuclear waste disposal, the topic of the Tri-State Cow-Calf Symposium at Haigler, Neb., was closer to home—"Producing the Cow of The Future Today."

There are things to learn about the state of the nation from America's 7,498 weeklies—things you won't find in the Congressional Record.

Sure, there's some bad news:

The taxpayers of Clinton County, Mo., may be stuck with the $20,000 medical bill resulting from the amputation of both legs of a suspect who escaped from the county jail and suffered severe frostbite while at large, says the Lawson Review.

The Osawatomie (Kan.) Graphic worries that Osawatomie's reputation as a railroad town may be slipping; the Union Pacific is thinking about routing even fewer trains through town.

But for all that, the weeklies report the news that tells you the heart of America is still ticking. Important news, because, after all, doesn't everyone come from a small town, or think he did, or wish he had?

In that case, here's some of the news from back home:

Wallace Wyatt Jr. promised that if he were elected probate judge of St. Clair County, Ala., he would eat a super-hot barbecue sandwich at Smitty's Barb-B-Que in Odenville, Ala. He was, so he did. "He said he wouldn't do it again for $500, and it wasn't something he'd wish on anyone, even a Republican," said the St. Clair News-Aegis.

Working on a master's degree, Melanie Reid of Due West, S.C., researched the history of the Opera House which opened in Abbeville, S.C., in 1908 and put the lie to some local legends. No evidence at all, she told the Abbeville Press and Banner, that Jimmy Durante, Sarah Bernhardt or the Ziegfeld Follies ever performed there.

In Oconomowoc, Wis., high school football player Rich Andrus was successfully recruited by the University of Wisconsin. Head coach Don Morton and an assistant called on him on the first day home visits were permitted. Exactly when did they arrive? At "12:01 a.m.," Andrus told the Oconomowoc Enterprise. He said such tenacity was "pretty impressive."

The Garden Club of Stamford, Texas, celebrated the 100th anniversary of Texas Arbor Day by planting two pecan trees on the west side of Post Office Square as a memorial to Mrs. A.C. Denson, longtime member of the club "who, had she lived another month, would also have been 100 years old," the Stamford American said.

Sheriff's Deputy Ernie Booth was assigned as the law enforcement officer for Millard, Juab and Beaver counties of Utah's West Desert. He has what Millard County Sheriff Ed Phillips called "the largest beat in the United States"—3,000 square miles. Almost triple the size of Rhode Island, it has a population of 500 to 600. Booth told the Millard County Chronicle Progress: "Basically I'm pretty well-qualified. I can ride a horse dang near anywhere. I rodeo a lot. I still ride bulls occasionally and I've team-roped. I know cattle."

The Manchester-Coffee County Beautification Association of Tennessee established a Litter Hotline for citizens to report the license numbers of people who toss trash from their vehicles. People who are turned in get a warning letter and a litter bag in the mail, the Tullahoma News reported.

In a letter to the editor of the Horton (Kan.) Headlight, Donna Hoffman protested a proposal discussed by the commissioners to kill stray cats. She wrote that cats help control the mice and rat population. "Imagine what it would be like with no cats to catch and kill these rodents! What's next? A rat ordinance?"

The conditions of the restrooms at Duran Junior High came up at a meeting of the Pell City Board of Education in Alabama. The problems—overcrowding, a lack of privacy and the urinals in the boys' room were so high the boys couldn't use them.

One angry father said he understood that if a boy was tardy because he had to wait to use the restroom he might get a paddling when he finally reached class.

The St. Clair News-Aegis quoted the father: "I'll tell you this, if my child comes home and says he got a paddling because he was held up in the bathroom, I'm going to come here and see some folks."

Feinsilber is a Washington, D.C.-based reporter for the Associated Press. This article is excerpted from one he wrote this year for the AP.

know where they live. It's hard to get them to read, to get them interested."

To counter this, Forbes Newspapers is conducting readership surveys to determine the interests of people it serves.

Some problems can be beyond a weekly's control. Nick Payton, editor and publisher of the Union County Leader in Clayton, N.M., says his area has been suffering a population drop for a decade. Fortunately, its farming and ranching economy is in an "up" cycle at the moment, and stores previously abandoned by national chains are being occupied by smaller, regional ones. Still, advertising linage is down, and Payton has reduced the size of the Leader's average edition from 24 pages to 18.

"We're not facing anything that other rural papers aren't facing," he says.

These kinds of problems have contributed to a general decline in the number of U.S. weeklies for much of this century.

More than 7,000 titles disappeared between 1914 and 1970, when the total stood at 7,612. David C. Simonson, NNA executive vice president, says the closures are largely attributable to consolidations, where a publisher buys out a competitor and combines operations.

For the past two decades the number of weeklies has held steady, with startups just about canceling out shutdowns. Publishers' Auxiliary, an NNA biweekly trade publication, began tracking such events in 1982, when 85 weekly papers began publishing and 71 stopped. Last year there were 71 startups and 41 closures, the publication reported.

Suburban weeklies account for a big chunk of the startup category. James D. Elsener, executive director of the Suburban Newspaper Association, says there were about 700 suburban weeklies in 1970, compared with more than 1,700 today.

DAILIES VERSUS WEEKLIES. As weeklies, especially the suburban variety, have prospered, many daily newspapers have stopped ignoring the competitive threat they pose.

The Boston Globe, for example, earlier this year started a 30-page zoned section serving 43 communities in South Boston called South Weekly. Editor Driscoll says the Globe over the next two years will begin cranking out similar sections for other suburban areas.

"This is a way for us to get more local news in the paper," he says. "I don't think this can approach what the weeklies are doing, but this is an effort on our part to reach into this level of coverage."

Driscoll sees news coverage of places outside major cities as breaking down into three distinct levels. One level is handled by the metro papers that skim the surface looking for the large, telling stories; another level is handled by the suburban dailies that provide slightly greater depth; and the third level is what the weeklies do.

This third level, says Canning of Minnesota Suburban Newspapers, is about the local hum-drum: traffic lights and scholarship winners and Little League box scores—things that dailies would likely consider too routine to report. But the people who drive through those intersections, who win the scholarships, who go 3 for 4 in the baseball game do not regard such happenings as routine.

Canning says the continuing suburbanization of America works in the weeklies' favor. "As a metro areas grows," he notes, "it becomes extremely difficult for a metro daily to cover individual communities. We have 100 different municipalities in the Minneapolis area. . . . That means there are opportunities (for us)."

The Star Tribune of Minneapolis is keenly aware of this situation, says Joel Kramer, executive editor and senior vice president for strategic planning. "We view our coverage as serving the needs from the world to the community level," he says. "But clearly we can't serve very local community news as weeklies do. We don't try. . . . We do try to select stories of interest to communities . . . to show trends in the schools and zoning."

The Star Tribune's six weekly zoned sections are dominated more by listings of local events, such as service club meetings and church dinners, than by hard news, he says.

In St. Louis, Publisher Nicholas G. Penniman IV of the Post-Dispatch says much the same thing. The larger community stories—political corruption, growth issues—will be covered by his paper, "but not every single Lions Club meeting" in the metropolitan area.

The Post-Dispatch is experiencing intense competition from a 43-member group of free weeklies, Suburban Newspapers of Greater St. Louis, owned by Ingersoll Publications (which also intends to start a paid daily, the St. Louis Sun, in September). Nancy Miller, suburban editor of the Post-Dispatch, says the paper has attempted to combat the weeklies by putting out six geographically zoned editions—one five days a week and each of the others twice weekly.

Says Penniman, "We've wrestled with the question of whether the daily can become even more local. But weeklies tend to be advertising-driven, and they can change their distribution pattern to suit changes in the market. . . . A metro daily can't. It doesn't have that flexibility. . . . This makes demands on the daily strong because we have to appeal to broad segments of the readership."

Penniman can see both sides of the issue. He is also senior vice president of newspaper operations of Pulitzer Co. and thus oversees Lerner Newspapers, a string of 10 suburban Chicago weeklies Pulitzer bought in 1986. From that vantage point he makes the observation that "all things are possible in the weekly business."

One possibility is to convert a weekly (or semiweekly or triweekly) paper to a daily schedule, which occurs at a rate of about nine papers per year. Such a huge step depends heavily on local economic trends and market potential, and it must be studied thoroughly (**presstime**, Dec. 1985, p. 24).

For papers that shed their weekly status, the trick is to hang onto the local orientation and closeness that readers find so beguiling.

"We'll be a community daily now," says Bradlee of Chesapeake Publishing in Maryland, which this month is converting The Cecil Whig of Elkton, a semiweekly, to five times a week. "It would be foolish to jeopardize its (weekly) character," he says.

A weekly that goes daily should remain 100-percent local in news content, asserts Robert J. Rossi, vice president for newspapers at Park Communications Inc. of Ithaca, N.Y., which has orchestrated such a move 11 times in the last 14 years. In fact, the company's chief criterion in acquiring a weekly is its prospect of coming out every day. Currently Park owns 35 weeklies and 41 dailies.

Yet the vast majority of weekly publishers seem content with their more leisurely publication schedules.

Hurt of Hurt Publishing in Ohio says he has no intention of converting any of his nine weeklies to dailies. "I don't want to complicate my life and screw up a good weekly," he says. ☐

Summer intern Christopher M. Changery contributed to this article.

Single-copy sales have clout

BY CRAIG C. STANDEN

Single-copy sales are becoming more important to newspapers of all sizes.

In the Newspaper Advertising Bureau's most recent readership study (1987), we found that 25 percent of American adults buy a single copy of a newspaper from a store, newsstand or vending machine sometime during the week, and 35 percent buy a Sunday paper that way. By circulation, the percentage of adults who are single-copy buyers looks like this:

Newspaper circulation	Weekdays	Sundays
Under 25,000	21%	25%
25-50,000	26	33
50-100,000	32	36
100-250,000	27	42
Over 250,000	37	44

Of course, because many single-copy buyers don't buy a paper every day, these are not the percentages of total *circulation* accounted for by single-copy sales. But they do account for a large—and growing—part of our total circulation.

However, some advertisers believe that single-copy buyers are less desirable than subscribers as customers, or that a paper bought by the single copy isn't as frequently used as a shopping aid, or that street sales substantially duplicate subscription sales.

To find out more about single-copy buyers, the bureau in 1988 commissioned a special study conducted in six major cities in various parts of the United States. In each of these million-plus-population markets, 200 randomly sampled single-copy buyers were interviewed.

Ninety-one percent of the single-copy buyers interviewed said the newspaper they bought was also available via subscription. But they said they preferred to buy the paper when they want it rather than subscribe. Here are some of their reasons:

I buy it when I like	30%
It's more convenient	21
No time to read some days	21
Past delivery problems	29

Which days do they buy? Outside of Saturday (when quite a few dailies don't publish), single-copy buying is pretty evenly distributed:

Monday	38%
Tuesday	36
Wednesday	42
Thursday	39
Friday	40
Saturday	29

Many buyers said they had specific reasons for buying the paper on specific days of the week; i.e., Monday for weekend sports results, Wednesday for food advertising and coupons, Friday for weekend entertainment and recreation calendars.

Three-fourths of these weekday single-copy buyers said they almost always or usually took the paper home with them. And fully 30 percent said they had bought some item of merchandise in the previous two weeks specifically because of an ad they had seen in their newspaper.

Thirty-one percent of the single-copy buyers told us they buy a newspaper only on Sundays. There seem to be two main categories of reasons why they buy. One is for specific content—either editorial (e.g., the TV magazine) or advertising (shopping information, classifieds and coupon inserts). The other is that there is more to read in the Sunday paper—and more time to read it. Here's how those reasons break down:

Specific editorial content	47%
More time to read on Sunday	35
Advertising	26
More to read in Sunday paper	18
To catch up on the news	12

Perhaps the most important findings from an advertiser's point of view is how single-copy buyers stack up as potential customers. To get an idea, we measured our respondents' ownership or recent purchase of a number of products and services, and compared the results with Mediamark syndicated data on adults in the top 50 Metropolitan Statistical Areas. Here's how they compare:

	NAB 6-city study	Adults in Top 50 MSAs
Own a car	91%	87%
Bought tires	40	36
Have cable TV	49	44
Have credit card(s)	75	65
Shopped past 30 days		
at K mart	47	44
at Sears	35	36
at Penney's	31	31
Bought jewelry	49	38
Made home improvement purchase	49	46
Shopped for food	94	86

I think this comparison demonstrates that single-copy newspaper buyers are excellent customers and prospects for almost any kind of merchandise. It should be good selling ammunition for you if any one questions the value of single-copy circulation.

A copy of NAB Research Note Number 21, on which this column is based, is available free to NAB members. Non-members can obtain a copy by sending a check for $8.75 to the Research Department, Newspaper Advertising Bureau, 1180 Avenue of the Americas, New York, N.Y. 10036. ☐

Standen, president of the Newspaper Advertising Bureau in New York City, is a regular contributor to **presstime**.

Readership leads list of concerns at Canada dailies

The Canadian Daily Newspaper Publishers Association has been told by members that its key goal should be retaining and increasing readership, according to a new survey.

Additionally, the members said they are concerned about competition for advertising and about the newspaper industry's relatively slow response to overall competition for readers and advertisers.

Generally, members told the association they want it to be a leader by being more aggressive and by presenting a higher profile both inside and outside the industry.

The CDNPA survey was conducted earlier this year by the research firm Urban & Associates of Sharon, Mass. Questionnaires were sent to 500 people in various departments of member newspapers, which resulted in 283 responses. In addition, 33 publishers and other key executives were interviewed.

Even though daily newspaper circulation in Canada has been growing—by 11 percent in 1988, due largely to the introduction of new tabloids—overall household penetration has declined, said CDNPA President John E. Foy.

He said that over the last 20 years household penetration has dropped from 80 percent to 63 percent.

CDNPA, which has 83 newspaper members, was also told to guard against judicial, regulatory and legislative encroachment into the newspaper business. Respondents said they felt such efforts will increase.

In a related matter, the association is likely to seek exemption for its members from a national goods and services tax to be proposed by the government of Prime Minister Brian Mulroney.

The tax, which the government says is needed to help alleviate a $35-billion national deficit, is expected to be proposed to Canada's Parliament next January by Finance Minister Michael Wilson.

Wilson said in April that the tax would be at a rate of 9 percent and would take effect Jan. 1, 1991. It would replace Canada's current sales tax of 8 to 18 percent on manufactured and processed goods.

Under the proposed measure, newspapers would have to pay taxes on newsprint and machinery and marketing of services, whereas under the sales tax they are exempt in these areas. The proposed tax would work much like a value-added tax; that is, businesses throughout the production and distribution chain would charge the tax on their sales. ☐

U.S. dailies' annual consumption drops slightly

Daily newspapers in the United States consumed 9,050,472 metric tons of newsprint in 1988, 0.8-percent less than a year earlier.

ANPA's annual state-by-state survey of dailies' newsprint consumption also shows that Vermont had the largest percentage increase between 1987 (8,523 tons) and 1988 (9,369), 9.9 percent. Next highest were Arkansas (6.8 percent), Nevada (4.2 percent), Florida (3.7 percent) and Maine (3.2 percent). Florida had the biggest increase in tonnage used, 21,666.

California led the nation in total consumption—1,297,883 tons, 14.3 percent of the national total.

There were net decreases in consumption in 34 states. New Mexico had the largest percentage decrease, 7.7 (2,222 tons). New York had the biggest decrease in tonnage, 28,235.

Regionally, the South recorded the only increase in newsprint use between 1987 (2,823,986 tons) and 1988 (2,831,667)—0.3 percent. The Northeast had a decline of 1.8 percent, the North Central states, 1.6, and the West, 0.4.

The annual ANPA survey [**presstime**, Aug. 1988, p. 62] covered 1,739 general-circulation daily newspapers as well as some foreign-language, college and special-service dailies such as trade newspapers. Together, they accounted for 73.4 percent of 1988's estimated newsprint consumption by all U.S. users of a record 12,337,000 tons—an increase of 0.1 percent from 1987's figure of 12,323,000.

The 0.8-percent decrease in consumption by U.S. dailies supersedes a preliminary estimate that had indicated an increase of 0.9 percent [**presstime**, April 1989, p. 78]. The preliminary estimate was derived from data supplied by newspapers in ANPA's statistical sample. The new consumption report was based on a survey of every U.S. daily newspaper. ☐

State-by-state newsprint consumption by U.S. daily newspapers*

	1987	1986	% change		1988	1987	% change
Alabama	74,994	76,920	-2.5	Montana	12,418	12,299	1.0
Alaska	16,792	18,155	-7.5	Nebraska	46,152	46,067	0.2
Arizona	138,847	146,146	-5.0	Nevada	46,663	44,799	4.2
Arkansas	63,744	59,697	6.8	New Hampshire	23,409	23,878	-2.0
California	1,297,883	1,285,435	1.0	New Jersey	391,788	395,041	-0.8
Colorado	180,904	188,544	-4.1	New Mexico	26,764	28,986	-7.7
Connecticut	116,945	120,126	-2.6	New York	934,795	963,030	-2.9
Delaware	17,322	18,722	-7.5	North Carolina	171,469	170,114	0.8
District of Columbia	260,082	254,302	2.3	North Dakota	12,412	13,350	-7.0
Florida	613,696	592,030	3.7	Ohio	338,555	345,066	-1.9
Georgia	209,790	208,614	0.6	Oklahoma	71,646	71,216	0.6
Hawaii	28,812	30,956	-6.9	Oregon	94,170	93,806	0.4
Idaho	15,371	15,521	-1.0	Pennsylvania	423,572	429,585	-1.4
Illinois	451,592	456,119	-1.0	Rhode Island	44,155	43,541	1.4
Indiana	149,188	148,218	0.7	South Carolina	72,606	72,988	-0.5
Iowa	72,435	74,023	-2.1	South Dakota	10,843	10,895	-0.5
Kansas	41,464	41,935	-1.1	Tennessee	121,824	120,417	1.2
Kentucky	70,253	71,442	-1.7	Texas	637,495	659,329	-3.3
Louisiana	109,475	111,279	-1.6	Utah	33,734	35,202	-4.2
Maine	27,934	27,079	3.2	Vermont	9,369	8,523	9.9
Maryland	124,154	124,442	-0.2	Virginia	146,644	144,773	1.3
Massachusetts	324,994	328,674	-1.1	Washington	139,229	139,349	-0.09
Michigan	322,040	333,828	-3.5	West Virginia	31,381	32,284	-2.8
Minnesota	135,277	135,663	-0.3	Wisconsin	130,485	130,532	-0.04
Mississippi	35,092	35,417	-0.9	Wyoming	5,962	6,119	-2.6
Missouri	173,852	180,190	-3.5	Total	9,050,472	9,124,666	-0.8

Regional newsprint consumption by U.S. daily newspapers*

	1988		1987		
	Number of newspapers	Consumption	Number of newspapers	Consumption	% change
Northeast	299	2,296,960	302	2,339,477	-1.8
North Central	549	1,884,295	540	1,915,886	-1.6
South	582	2,831,667	580	2,823,986	0.3
West	309	2,037,550	304	2,045,317	-0.4
Total	1,739	9,050,472	1,726	9,124,666	-0.8
Total consumption by *all* U.S. users		12,337,000		12,323,000	0.1

---

*Metric tons

Demand in U.S. falls slightly

Newsprint demand in the United States decreased six-tenths of a percent last year from 12.5-million metric tons in 1987 to 12.4-million tons, according to an annual survey by the Canadian Pulp and Paper Association.

The results, published in CPPA's "Newsprint Data '88" booklet, also showed that Japan led the world last year in absolute growth of newsprint capacity—a net increase of 395,000 metric tons, about 14-percent more than in 1987. Japan accounted for the world's second-greatest demand, 3.4-million tons. Demand equals consumption plus inventories.

Sweden had the second-largest capacity increase, 215,000 tons, or about 10 percent more; it was followed by Canada with an additional 160,000 tons, about 2 percent more than the previous year. Capacity grew by 100,000 tons in the United States, also about 2-percent more than in 1987.

Canada remained comfortably in first place for production with 10-million tons in 1988. The United States was second at 5.4-million and Japan third at 3.1 million.

The United States was the leading importer of newsprint, buying 7.4-million tons. Britain was second with 1.4 million and West Germany third with 886,000.

Canada exported the most newsprint, 8.6-million tons. Sweden and Finland were second and third with 1.7-million tons and 1.1-million tons, respectively.

Among other statistics in the CPPA report:

- World newsprint demand increased 4.2 percent last year to 31.7-million tons. World demand was 93.2 percent of capacity, the same as in 1987.
- World capacity was 34-million tons, a 3.9-percent increase.
- Canada's share of world capacity decreased over 1978-88 from 35 percent to 29.7 percent.

Copies of the report are available from ANPA's Newsprint Department at The Newspaper Center, Reston, Va. ☐

Publishers lead in 1989 salary increases, second annual compensation survey shows

Publishers in the United States and Canada are drawing an average annual base salary of $105,763 this year, up 7.8 percent from $101,608 a year ago, for the greatest jump in pay among top newspaper executive slots, according to ANPA's second annual Newspaper Industry Compensation Survey.

The publishers' average total direct pay, which includes incentive awards, increased 5.7 percent, from $120,766 to $125,461, since last year's inaugural survey [**presstime**, Aug. 1988, p. 64].

However, the highest base pay for a publisher reported was $450,000 a year, down from $504,000 in 1988, and the highest total direct compensation also declined, from $741,417 to $680,000.

The 1989 survey includes salaries for 62 categories of jobs reported by 526 dailies. Last year, it encompassed 59 job categories taken from 583 responding newspapers. The comparative percentages are based solely on newspapers that returned questionnaires for both years, the survey's researchers said.

"The 526 newspapers are a good representative sample by circulation and by geographic distribution of the total ANPA membership," the researchers affirm in their introduction to the survey. The survey's purpose "is to provide comprehensive pay data that will enable newspapers to compare their compensation levels geographically, by circulation size, and with the newspaper industry as a whole."

Professor Hervey A. Juris of the Kellogg Graduate School of Management at Northwestern University and Robert J. Greene of Touche Ross and Co. supervised both years' surveys, and the information was processed at the research department of the Inland Press Association in Park Ridge, Ill.

Data compiled in the 1989 survey show the average base salaries for all top management positions increased. (See accompanying charts.) So did total direct pay for these high-level positions. However, these increases for the most part were smaller.

"In general, bonus and incentive plans did not pay off as well in a down year for the industry," Juris said.

The top operations, or production, executive received the greatest percentage increase among newspaper executives in average total direct pay: up 8.2 percent from $57,230 to $62,289. The average base pay for that position rose 7.5 percent from $51,293 to $56,379.

Publisher

Number of newspapers reporting: 348

Summary results

	Lowest	Median	Average	Highest
1989 base pay	$25,592	$90,000	$105,763	$450,000
1988 base pay	21,000	85,000	101,608	504,000
1989 total direct compensation	25,592	101,850	125,461	680,000
1988 total direct compensation	21,000	96,900	120,766	741,417

By circulation

	Number of newspapers	Average number of employees supervised	1989 base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	7	64	$ nsd[2]	$ 46,000	$ 54,109	$ 54,000	$ 62,624
5,001-10,000	37	41	48,000	51,000	57,537	63,000	69,091
10,001-15,000	49	63	66,000	62,000	71,847	75,000	84,490
15,001-20,000	39	98	66,000	70,000	79,168	82,000	88,827
20,001-30,000	54	114	86,000	80,000	90,950	94,400	102,800
30,001-50,000	57	198	96,000	96,000	104,032	113,404	118,804
50,001-75,000	37	291	109,000	105,000	114,864	125,000	134,001
75,001-100,000	16	406	122,000	124,500	134,381	137,106	157,579
100,001-150,000	19	485	125,500	140,000	146,994	165,302	177,922
150,001-250,000	18	959	153,000	180,000	192,430	220,250	241,433
250,001-500,000	6	1,932	nsd[2]	263,000	232,974	309,300	276,351
500,001 and over	9	2,657	nsd[2]	290,000	310,483	350,000	430,516

Editor

Number of newspapers reporting: 340

Summary results

	Lowest	Median	Average	Highest
1989 base pay	$16,500	$54,750	$62,998	$239,295
1988 base pay	15,072	52,000	60,985	275,000
1989 total direct compensation	16,500	57,436	69,976	345,000
1988 total direct compensation	15,072	55,247	70,731	471,000

By circulation

	Number of newspapers	Average number of employees supervised	1989 base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	3	12	$ nsd[2]	$ 25,128	$ 26,009	$ 25,128	$ 26,009
5,001-10,000	26	9	30,000	29,450	30,153	32,096	31,686
10,001-15,000	38	16	36,400	37,376	38,486	38,873	41,091
15,001-20,000	37	23	38,792	40,924	44,377	41,500	46,421
20,001-30,000	55	28	57,000	46,000	47,713	49,000	50,919
30,001-50,000	59	56	66,000	56,368	58,839	61,478	63,457
50,001-75,000	41	61	74,000	64,000	65,944	72,932	71,352
75,001-100,000	20	116	86,000	71,466	75,561	82,645	84,249
100,001-150,000	20	126	86,000	79,274	86,663	96,961	99,150
150,001-250,000	19	219	96,000	100,000	102,985	123,500	117,704
250,001-500,000	11	292	111,904	130,416	134,289	153,865	161,256
500,001 and over	11	488	192,000	178,500	179,554	190,000	223,895

[1] Median of midpoints of pay ranges reported

[2] Not sufficient data—fewer than three newspapers reported

The data processing executive received the smallest boost in average base salary, up 3.1 percent to $42,621 this year, as well as the smallest increase in average total direct pay, up 1.4 percent to $45,006.

The survey documented these increases in average base salaries for other key executives:

- For the editor, up 4.7 percent to $62,998.
- For the top circulation executive, up 3.3 percent to $45,154.
- For the top human resources executive, up 7 percent to $50,699.

This year's survey also shows increases in the average base pay for other levels of editorial, operations, and sales and marketing jobs. For instance, average base pay for managing editors rose by 4.7 percent; for pressroom superintendents, 5 percent; for creative services managers, 7.5 percent; and for circulation district sales managers, 1.2 percent.

Overall, pay for executives rose approximately 5.5 percent since the 1988 survey, while pay for manager-level personnel increased about 5 percent.

Pay for non-managerial positions also rose:

- Entry-level reporters, up 6 percent to $19,952.
- Copy editors, up 5.1 percent to $31,437.
- Advertising artists/copy writers, up 4.2 percent to $24,539.

The study breaks down the information by region and circulation category.

Newspapers with higher circulations predictably pay higher salaries to their top management team.

For instance, publishers running dailies with a circulation of more than a half million make an average of $310,483 a year in base salary, while those at papers with a circulation of 5,000 or less draw an average of $54,109. Newspapers in the circulation category of 100,001-150,000 pay their publishers an average of $146,994.

By the same token, the average annual base pay for top editors in the 1989 survey is $26,009 at dailies of 5,000 or less circulation, $86,663 at papers of 100,001-150,000 circulation, and $179,554 at papers with a circulation of 500,001 or more.

In regional comparisons, the Middle Atlantic area emerged as the most generous in its yearly base pay for publishers at $133,682, beating out second-place New England and the third-place Pacific region that had ranked first a year ago.

Canada, classified as one of 10 "regions," was fourth, and in last place were the western Midwest states of Iowa, Kansas, Missouri, Nebraska, North Dakota and South Dakota with an average base pay of $78,492 for publishers.

Because of variances in the experience, skills and performance of employees, the survey takers caution that "individuals at a particular newspaper could properly be paid 15-20 percent above or below the average rate for their job as shown in this survey."

In addition, they advise, a good pay plan prices jobs competitively within a relevant labor market.

Top advertising executive

Number of newspapers reporting: 408

Summary results

	Lowest	Median	Average	Highest
1989 base pay	$15,000	$46,000	$50,388	$160,000
1988 base pay	15,000	41,800	47,685	175,000
1989 total direct compensation	18,314	50,000	56,691	173,423
1988 total direct compensation	18,304	44,980	54,618	323,916

By circulation

	Number of newspapers	Average number of employees supervised	1989 base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	7	13	$ nsd[2]	$ 22,581	$ 27,940	$ 28,000	$ 31,998
5,001-10,000	45	7	27,040	27,535	27,645	30,420	32,044
10,001-15,000	47	10	36,400	31,562	33,768	38,272	38,061
15,001-20,000	47	16	36,400	36,500	37,742	40,523	41,668
20,001-30,000	63	20	57,000	41,933	42,375	46,280	47,018
30,001-50,000	66	35	49,550	48,438	51,180	54,320	57,246
50,001-75,000	43	46	74,000	56,180	58,802	63,325	64,952
75,001-100,000	21	60	86,000	66,000	67,149	70,200	73,172
100,001-150,000	28	80	71,500	65,535	67,862	68,937	74,546
150,001-250,000	20	138	96,000	85,950	85,221	100,251	102,581
250,001-500,000	15	203	96,000	101,500	98,248	115,365	114,653
500,001 and over	6	184	nsd[2]	111,725	115,524	126,940	131,337

Top circulation executive

Number of newspapers reporting: 472

Summary results

	Lowest	Median	Average	Highest
1989 base pay	$13,000	$39,560	$45,154	$157,500
1988 base pay	9,500	36,400	42,056	225,000
1989 total direct compensation	13,000	41,852	49,639	232,500
1988 total direct compensation	9,500	38,500	46,435	275,000

By circulation

	Number of newspapers	Average number of employees supervised	1989 base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	8	23	$ nsd[2]	$ 18,100	$ 21,929	$ 19,300	$ 22,229
5,001-10,000	49	8	24,882	22,500	23,742	24,110	25,027
10,001-15,000	62	12	32,700	27,780	28,642	28,970	30,308
15,001-20,000	54	20	37,550	34,310	34,062	36,753	36,428
20,001-30,000	74	24	36,192	36,745	36,151	38,936	38,086
30,001-50,000	74	42	51,800	42,685	44,821	47,825	49,282
50,001-75,000	48	60	66,000	52,400	52,243	56,617	56,904
75,001-100,000	24	107	64,100	61,850	61,851	66,650	68,230
100,001-150,000	28	150	66,118	62,399	64,198	70,661	72,233
150,001-250,000	22	309	86,000	74,500	75,166	83,787	86,820
250,001-500,000	15	448	94,632	88,500	88,480	109,500	100,807
500,001 and over	14	890	128,000	114,500	114,030	131,750	135,757

"A good pay plan should also provide for pay equity among like jobs within an organization and sufficient pay differences between levels so that employees strive for advancement," Juris and Greene said in their report.

Copies of the report are scheduled to be mailed this summer to all newspapers that participated in the survey, said Barbara M. Rotherham, ANPA administrator. Dailies that did not take part in either the 1988 or 1989 study may also receive a copy if they sign a letter of intent to provide information for the next annual compensation survey, she said. For further information, contact Rotherham at The Newspaper Center in Reston, Va., (703) 648-1031.

Also available are customized reports that allow a newspaper to request data from 10 to 20 newspapers according to metro area size, narrow geographical region, specific market or other criteria. The information will be compiled in summary form to ensure the anonymity of the study participants.

Such reports can be ordered at a cost of $250 per report directly from the Inland Press Association, 777 Busse Highway, Park Ridge, Ill. 60068, (312) 696-1140. ☐

Top operations (production)

Number of newspapers reporting: 320

Summary results

	Lowest	Median	Average	Highest
1989 base pay	$19,003	$49,000	$56,379	$220,000
1988 base pay	10,000	45,427	51,293	255,000
1989 total direct compensation	19,220	53,925	62,289	280,000
1988 total direct compensation	10,000	49,000	57,230	353,250

By circulation

	Number of newspapers	Average number of employees supervised	1989 base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	2	nsd[2]	$ nsd[2]	$ nsd[2]	$ nsd[2]	$ nsd[2]	$ nsd[2]
5,001-10,000	19	13	28,570	28,496	29,151	30,250	31,268
10,001-15,000	26	19	40,000	33,800	34,201	35,269	36,190
15,001-20,000	29	33	40,000	41,000	40,033	43,000	41,642
20,001-30,000	38	42	53,000	40,530	41,554	43,637	44,672
30,001-50,000	64	61	53,000	47,050	50,327	51,128	54,190
50,001-75,000	42	89	51,050	54,000	55,209	58,650	58,677
75,001-100,000	21	141	74,000	65,000	68,065	73,202	76,528
100,001-150,000	26	171	74,000	63,000	65,297	73,804	73,674
150,001-250,000	22	278	86,000	80,499	78,710	88,064	89,903
250,001-500,000	17	590	91,736	83,512	92,558	100,000	106,368
500,001 and over	14	1,073	127,000	128,007	129,487	149,759	155,087

Guild gets city, Sunday editors

A city editor and Sunday editor who have only limited supervisory duties at the Scrantonian Tribune of Scranton, Pa., are not managerial employees and therefore come under the aegis of the local Guild unit, the NLRB ruled.

The Tribune and Scranton Newspaper Guild Local 177 had asked for the clarification of the two employees' status.

Although the two edit reporters' stories, decide which stories to use, write headlines and lay out pages, these decisions are subject to final review by the executive editor, a three-member panel of the board unanimously ruled.

According to the panel, the executive editor "exercises substantial control over even the day-to-day news decisions as to the content of the paper and makes all of the important policy decisions for the paper."

The panel found that the executive editor interviews applicants for reporters' jobs and makes independent decisions on whom to hire. The executive editor also evaluates the work of reporters and makes independent decisions on whether to discipline them.

The three board members made a distinction between small papers and large ones, citing a 1976 NLRB decision involving the now-defunct Philadelphia Bulletin.

In that case, the Sunday editor was found to be "directly involved in making fundamental changes in the newspaper, chaired weekly policy meetings and dealt directly with the publisher and other top executives."

The Scranton paper, on the other hand, usually has fewer than 10 reporters working on a given day, and the city and Sunday editors "merely require the exercise of news judgment" as opposed to supervisory or managerial authority, the panel said.

Both the Tribune and the Guild local had asked for a unit-clarification decision on a number of circulation and editorial department employees more than two years ago.

In September 1987, an NLRB acting regional director decided that the city editor, Sunday editor, assistant circulation manager, circulation supervisor and circulation district managers were managerial employees and therefore should be excluded from the Guild unit.

Eight other employees, all Guild-unit members whose status was also under question, were dismissed from the petition by the regional director.

At the request of both the company and the union, the NLRB on Oct. 3, 1988, granted a review of the decision but only with respect to the city editor and Sunday editor. All other decisions of the acting regional director were accepted without review. ☐

Union coalition targets Knight-Ridder

More than 80 members of four major newspaper unions met in St. Paul to work out plans for coordinated bargaining at Knight-Ridder Inc. papers.

The unions—The Newspaper Guild, the Communications Workers of America, the Graphic Communications International Union and the Teamsters—formed a coalition last Feb. 20 "to counter the increasingly negative union and employee relations policies emerging in several newspaper chains," in the words of The Guild Reporter newspaper.

The coalition, called the Newspaper Industry Coordinating Committee, previously had targeted coordinating efforts at newspapers owned by McClatchy Newspapers, The Copley Press Inc. and MediaNews Group [**presstime**, April 1989, p. 55].

During the meeting June 25-26, dozens of union members engaged in informational picketing in front of the St. Paul Pioneer Press Dispatch. A Guild spokesman said the St. Paul daily was singled out only because it is a Knight-Ridder paper published where the coalition met—not because of any local issues.

Guild President Charles B. Dale chaired one of several sessions in which tactics were discussed for battling "hostile management," but the tactics were not disclosed publicly. ☐

NOTE

ONLY THE FOLLOWING PAGES OF THIS

PUBLICATION HAVE BEEN FILMED

Cov. 1, Pgs. 2, 5, 69

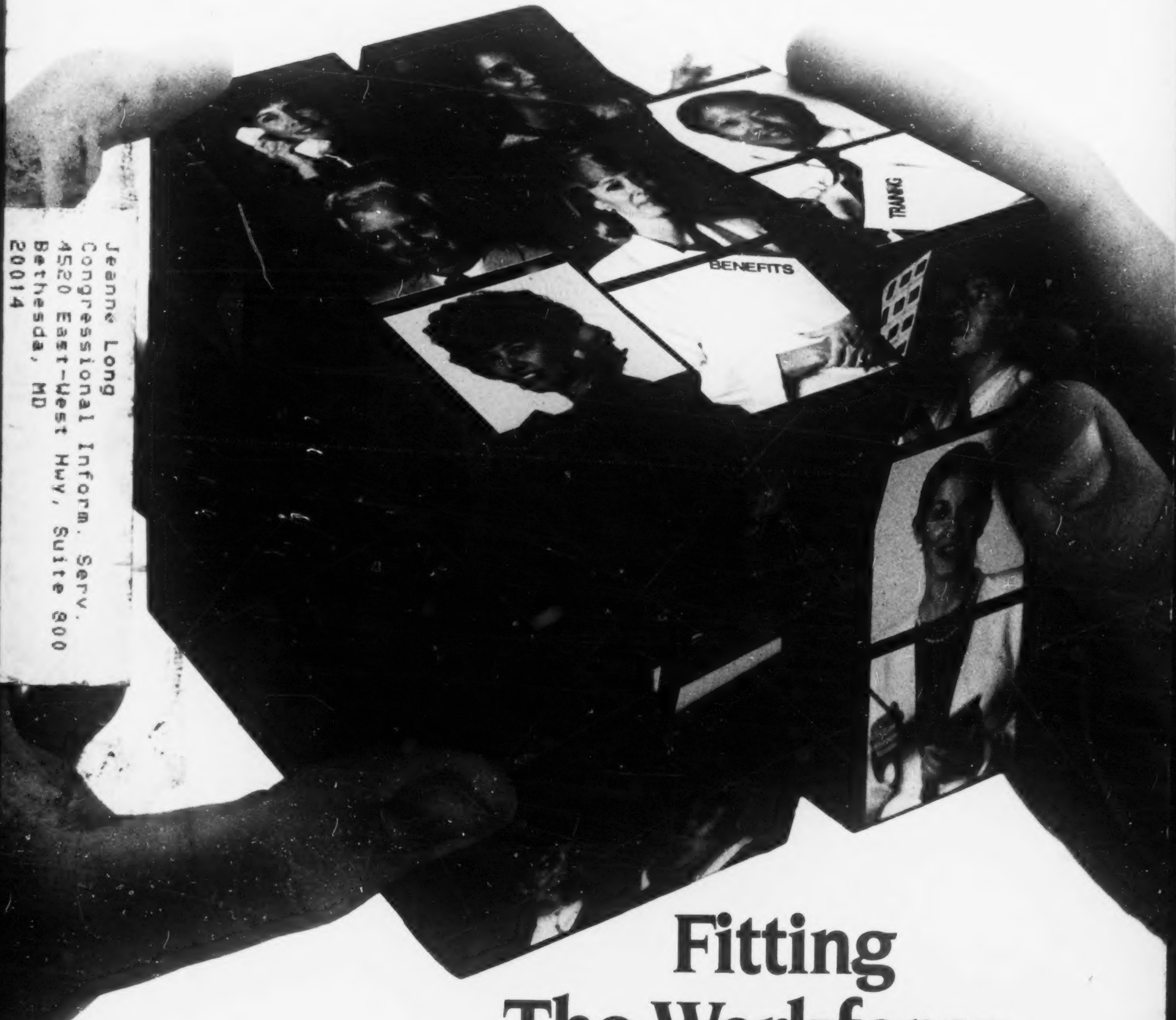
A2350-2

September 1989

presstime

Sunday Magazines Fight an Uphill Battle

The Journal of the American Newspaper Publishers Association



Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

Fitting The Workforce Into New Structure

CHAIRMAN'S CORNER

Funds needed to sustain Foundation's minority programs

Because of the important role ANPA Foundation continues to play in encouraging a racially and culturally diverse newspaper workforce, I invited Foundation Chairman Donald E. Newhouse, president and general manager of The Star-Ledger in Newark, to be guest columnist this month.

—ANPA Chairman William H. Cowles 3rd

The faces of North America's workforce and of our newspapers are changing.

An excellent report of the Task Force on Minorities in the Newspaper Business, "Cornerstone for Growth: How Minorities Are Vital to the Future of Newspapers," tells us that by 2000—just over 10 years from now—85 percent of the people entering the workforce will be women and minorities.

Newspaper publishers, the report correctly says, must focus on the most dynamic segments of their local communities—minorities—as a cornerstone for future success.

Helping newspapers focus on minorities as employees, readers and advertisers has been a major concern of ANPA Foundation for the past five years. Through job fairs, advisory services, fellowships, publications, youth-outreach projects and other important activities, the Foundation's minority affairs program has shown successes that will become more and more evident.

But our Foundation needs your *sustained* help if it is to continue the important task of furthering workforce diversity.

In July, Sandra Hardy, immediate past chairman of the Foundation, and I sent you a detailed report of the Foundation's proposed programs and activities through 1994. Included in the materials we sent was a plea for financial support. Obviously, this is not something we do lightly or often; in fact, this project is the *only* one for which we seek special funding.

Donald E. Newhouse

Our letter told you the details. The funds pledged from your original donations provided $135,000 per year for our Foundation's excellent 1986-1990 minority efforts. For the past two years, however, that sum has represented only one-third of the total spent by the Foundation in its efforts to help you enhance workforce diversity. We invest $360,000 a year on our minority affairs programs alone.

To continue these vital efforts at the current pace, the Foundation is embarked on a campaign seeking $2 million for the next five years.

Newspapers have a special leadership role in enhancing opportunities for minorities. We do so because it is the right thing to do, and because it also is good business to have employees from diverse backgrounds help us better cover and serve our complex communities.

We hope you will be supportive of another five years of Foundation work in this arena. ANPA Foundation—and through it, our industry—depend on your sustained commitment. Please send me your pledge.

Donald E. Newhouse

Donald E. Newhouse
ANPA Foundation Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Charlene Gridley
Circulation Manager, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041,
(703) 648-1000
FAX (703) 620-4557

Advertising Sales Representatives
East/Southeast
Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 401 Park Ave. South, New York, N.Y. 10016, (212) 545-5100
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601, (312) 977-1933
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067, (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041.

BPA **Presstime** is a member of the Business Publications Audit of Circulation Inc.

presstime

INDEX

VOLUME 11, NUMBER 9

SEPTEMBER 1989

Special Report *Sweeping changes in the last two decades have transformed the industry from one top-heavy with people operating big machines to one staffed largely by white-collar and clerical employees. Computers now dominate the news, advertising and circulation departments, and they soon may take over the complete production process. The changing role of workers in other departments is no less startling. And it is clear that as the industry girds for the competitive challenges of the 1990s, there will have to be further adjustments to organizational structures.* **18**

Ads elude Sunday magazines *Attractive to readers but shunned by advertisers, some local publications succumb. Others try new formulas.* **6**

Check it out *When it comes to extending credit, newspapers can either run credit checks or run the risk of accepting advertisers with checkered histories.* **12**

Up-front ads *Only a few newspapers run ads on their front pages, and some say those that don't are missing out on a reader service and new revenue.* **14**

Beat it! *As they seek to cater to readers' interests in specialized subjects, newspapers are establishing news beats in unprecedented areas.* **24**

Taking the high road *Journalism students want tools to work through moral dilemmas, and professors are responding with more ethics training.* **30**

Profile: Caroline John *Undeterred by an initial rebuff, this determined Cox executive has seen the newspaper business from many sides.* **34**

Essay: Point-counterpoint *A federal legislator and a newspaper publisher go at it over the sticky issue of what to do about tobacco ads.* **36**

Funny pages fight *The two fiercely competitive Dallas papers are in court again, this time over syndicated comic strips and columns.* **47**

From gloom to bloom *A ray of hope about ad sales was extended to those attending the midyear INAME sales conference, but first came gloom.* **51**

Lesson plans *Forty-two seminars and workshops sponsored by ANPA and ANPA Foundation have been announced for 1990. Here's a preview.* **53**

Long-distance repairs *Remote diagnostic services are used for a variety of electronic systems, saving time and money.* **62**

Sunday Magazines, p. 6

Changing Organizational Structure, p. 18
(Cover photo by Jim Tetro.)

Teaching Ethics, p. 30

Advertisers index	75
Advertising	51
ANPA calendar	71
Chairman's corner	2
Circulation	46
Education	49
Employee relations	58
Government affairs	40
Letters	75
Minority affairs	48
Newspaper business	72
Newsprint	69
Overset	76
'Shoe'	61
Speeches	45
Syndicates	47
Technology	62
Telecommunications	46
Training	53
World press	75

Consumption is down for 6-month period

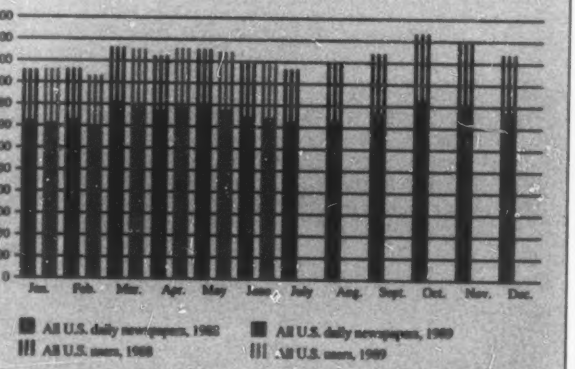
Newsprint consumption by all U.S. users totaled 993,376 metric tons in June, a decrease of 0.4 percent from the June 1988 figure of 997,085 metric tons, according to preliminary estimates.

For the first six months of 1989, consumption was down 0.2 percent.

U.S. daily newspapers in June used 748,763 metric tons of newsprint, 0.2 percent more than the 747,593 metric tons they used a year earlier. However, for the first half of 1989, their consumption decreased 0.7 percent.

Newsprint inventories for newspapers in ANPA's statistical sample averaged a 44-day supply in June, compared with a 52-day supply in June 1988. Stocks of North American newsprint mills increased 31 percent.

Canadian newsprint mills operated at 95 percent of rated capacity in June and at 96 percent for the year to date. U.S. mills operated at 96.7 percent and 96.3 percent of capacity, respectively.



Estimated newsprint consumption, 1988-1989 (thousands of metric tons)

Estimated consumption of all U.S. daily newspapers[1]

Region	**May 1989(r)**	**May 1988**	**% Change**
Northeast	192,463	208,434	-7.7
North Central	167,342	168,337	-0.6
South	246,236	245,366	+0.4
West	182,175	180,949	+0.7
Circulation Size			
up to 25,000	59,173	60,485	-2.2
25,001-100,000	172,528	169,376	+1.9
Over 100,000	556,515	573,225	-2.9
May totals	788,216	803,086	-1.9
Five-month totals	3,798,197	3,829,457	-0.8
Region	**June 1989(p)**	**June 1988**	**% Change**
Northeast	184,148	194,233	-5.2
North Central	159,509	160,293	-0.5
South	233,998	221,335	+5.7
West	171,108	171,732	-0.4
Circulation Size			
up to 25,000	55,105	53,856	+2.3
25,001-100,000	164,469	161,284	+2.0
Over 100,000	529,189	532,453	-0.6
June totals	748,763	747,593	+0.2
Six-month totals	4,546,960	4,577,050	-0.7

Estimated consumption of all U.S. users

	1989	**1988**	**% Change**
April totals	1,058,510(r)	1,023,484	+3.4(r)
May totals	1,043,383(r)	1,058,414	-1.4(r)
June totals	993,376(p)	997,085	-0.4(p)
Six-month totals	6,046,915(p)	6,059,739	-0.2(p)

Production

	Canada	**U.S.A.**	**North America**
June 1989	799,679	451,697	1,251,376
June 1988	798,564	444,799	1,243,363
Increase	+1,115 +0.1%	+6,898 +1.6%	+8,013 +0.6%
Six months 1989	4,885,720	2,690,297	7,576,017
Six months 1988	4,995,455	2,711,027	7,706,482
Decrease	-109,735 -2.2%	-20,730 -0.8%	-130,465 -1.7%

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
June 1989	573,482	96,480	150,868	820,830
June 1988	590,434	103,013	157,469	850,916
Six months 1989	3,360,847	580,521	822,531	4,763,899
Six months 1988	3,519,347	608,531	746,080	4,873,953
Increase or decrease	-158,500 -4.5%	-28,010 -4.6%	+76,451 +10.2%	-110,059 -2.3%
From U.S. mills				
June 1989	407,162		44,622	451,784
June 1988	421,127		27,500	448,627
Six months 1989	2,422,660		243,268	2,665,928
Six months 1988	2,536,033		151,756	2,687,789
Increase or decrease	-113,373 -4.5%		+91,512 +60.3%	-21,861 -0.8%
From North American mills				
June 1989	980,644	96,480	195,490	1,272,614
June 1988	1,011,561	103,013	184,969	1,299,543
Six months 1989	5,783,507	580,521	1,065,799	7,429,827
Six months 1988	6,055,380	608,531	897,836	7,561,747
Increase or decrease	-271,873 -4.5%	-28,010 -4.6%	+167,963 +18.7%	-131,920 -1.7%

Stocks

U.S. publishers[3]	**Tonnage**	**Days' supply on hand**	**Days' supply in transit**
April 1989	850,029	36	5
April 1988	971,780	40	6
May 1989	837,457(r)	36	5
May 1988	951,494	40	6
June 1989	831,473(p)	39(p)	5(p)
June 1988	989,453	45	7
Canadian mills			
June 1989	412,309	—	—
June 1988	310,592	—	—
U.S. mills			
June 1989	72,462	—	—
June 1988	59,369	—	—

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

NOTE

ONLY THE FOLLOWING PAGES OF THIS
PUBLICATION HAVE BEEN FILMED

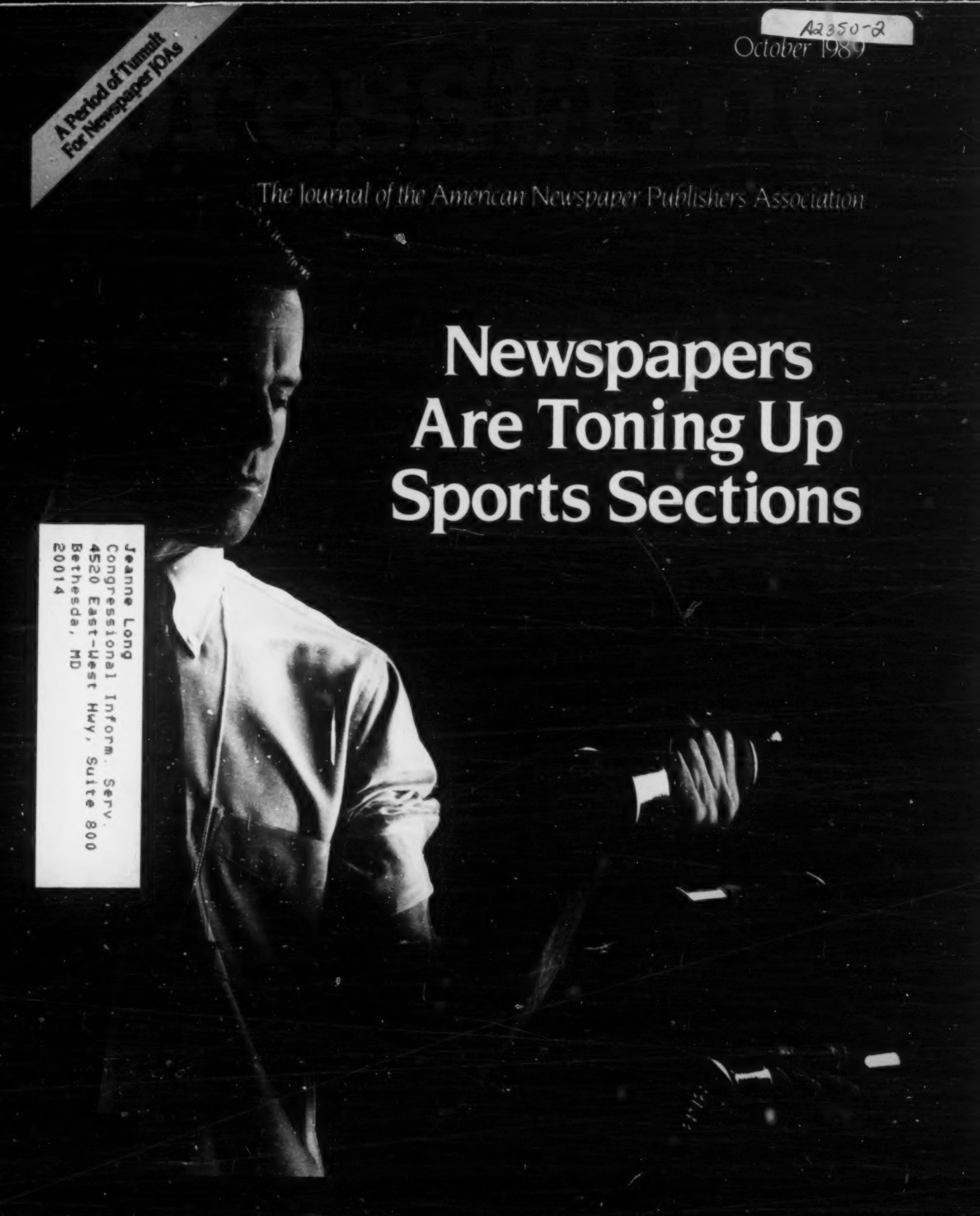
Cov. 1, Pgs. 3, 4, 6-9, 54

A2350-2

October 1989

A Period of Tumult For Newspaper JOAs

The Journal of the American Newspaper Publishers Association



Newspapers Are Toning Up Sports Sections

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

presstime

INDEX VOLUME 11, NUMBER 10 OCTOBER 1989

Special Report *Newspaper sports sections are undergoing a metamorphosis. Cheerleading is out, hard-nosed journalism is in. Sportswriters are changing, too. "Sports business reporters" and other specialists are supplementing traditional game stories with unprecedented "off field" coverage. And sportswriting is no longer the exclusive province of White males. Research indicates that sports sections have a loyal following, especially among men. Publishers hope expanded sports coverage will help them be a winner in the all-important contest to attract new readers.* **20**

JOA paradox *Despite a current surge in JOA activity, the Newspaper Preservation Act is relevant to fewer and fewer newspapers.* **6**

The goods on packaging *New equipment is boosting zoning, but the mailroom still lacks a computer link with other key departments.* **10**

Interview: Robert L. Ballow *An attorney with a "union busting" reputation sounds off on the organized labor of today and tomorrow.* **16**

How do you rate? *Many managers dislike employee evaluation procedures, but the right approach benefits everyone.* **30**

Trying to collect *The IRS is checking up on circulation departments as it seeks tax revenue by reclassifying independent contractors.* **35**

Profile: Gregory Jones *The Plain Dealer's home delivery sales manager provides a living example of tenacity and enthusiasm to colleagues and carriers.* **38**

Essay: Welcome criticism *J-school critiques of Ottaway newspapers offer fresh points of view, says Vice President/News A.N. Romm.* **40**

Supreme Court preview *Two cases already scheduled for review are being watched by publishers, and others are in the wings.* **42**

Listening to women *A Florida daily establishes a committee of 10 women from the community to find out what their reading interests are.* **45**

Special assessment *Six newspaper executives will visit three newspapers to find out their secrets to circulation success.* **50**

Recycling policy *The ANPA Board supports voluntary efforts to recycle old newspapers but opposes government restrictions on newsprint use.* **52**

JOA Newspapers, p. 6

Sports Coverage, p. 20
(Cover photo by Gary D. Landsman.)

THE
TAMPA
TRIBUNE

Independent Contractors, p. 35

Advertisers Index	65
Advertising	49
ANPA calendar	66
ANPA news	65
Books	65
Chairman's corner	4
Circulation	50
Education	44
Employee relations	61
Government affairs	42
Minority affairs	48
News-editorial	45
Newspaper business	64
Newsprint	52
Overset	68
Postal affairs	43
Readership	47
Research	46
'Shoe'	45
Speeches	67
Syndicates	51
Technology	55
Telecommunications	46

CHAIRMAN'S CORNER

10th anniversary of presstime is a time to look ahead

As one more example that time flies, consider this: **Presstime** has just completed its first decade of publication.

It was more than 10 years ago when the ANPA Board of Directors gave the go-ahead for publication of a monthly magazine. As with most good ANPA ideas, this one came from you, the Association's members. In our first membership survey, in the late 1970s, you said you thought ANPA could and should do a better job of disseminating information to member papers and to the public in general. We have done that.

Here are just a few of the goals and objectives the Board laid out for **presstime** back in 1979:

- "To establish the pre-eminent newspaper-business trade association publication in North America. . . .
- "To meet objectively controversial issues facing the newspaper business. . . .
- "To anticipate by spotting trends and problem areas in the newspaper business and to explore those areas objectively and promptly. . . .
- "To raise ANPA's general image and visibility thus enhancing its effectiveness."

William H. Cowles 3rd

Presstime has more than met its goals. In ANPA's second membership survey, conducted just last year, our magazine was found to be the "major point of contact with ANPA across all management types," and it was listed as one of the major reasons ANPA was perceived to be "more effective" by a majority of responding newspaper executives.

The results of a **presstime** readership survey conducted last year by The Gallup Organization turned up similar glowing reviews.

In addition to its continually improving editorial quality, **presstime** has scored some steady gains on the circulation and advertising fronts.

The October 1979 original issue—which, incidentally, included a cover story about how the energy crunch was affecting newspapers; remember that problem?—was circulated to 6,307 people, not counting sample copies. Circulation now is 13,524.

In the fall of 1983 the magazine was redesigned. The "new look" **presstime** made its debut in January 1984, and three months later the magazine began running advertising. Ad pages grew steadily from 130 in 1984 to nearly 400 in 1987 and 1988.

The success of **presstime** is shared by many—ANPA members who identified the need, Directors who launched it, ANPA staff members in other departments who lend their expertise to the magazine's staff and, most especially, the magazine's past and present staffs, the current list of which is elsewhere on this page.

Anniversaries are good times for looking backward, but better times for looking ahead. More than 10 years ago, you had the idea that led to this magazine. I'm sure you have more thoughts now about how it could do more and better things for our Association and for newspapering in general. I invite you to send those ideas along so that we can help continue the success that has been **presstime**.

Bill Cowles

William H. Cowles 3rd
ANPA Chairman

ANPA

presstime®

Publisher, Jerry W. Friedheim
Editor, James E. Donahue
Managing Editor, Maurice Fliess
Assistant Managing Editor, C. David Rambo
Assistant Managing Editor, Pamela M. Terrell
Staff Writer, Mary A. Anderson
Staff Writer, Rolf Rykken
Staff Writer, Christine Reid Veronis
Technology Writer, Rosalind C. Truitt
Labor Writer, Gene Goltz
Art Director, Charlene Gridley
Circulation Manager, Mary B. Nahan

Advertising Manager, Jonathan A. Reed
Advertising Assistant, Wendy Weiss

ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041,
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives
East/Southeast
Bob Gardner, Pete Uhry, John Adams, Bob Bruder, Marketing & Media Decisions, 401 Park Ave. South, New York, N.Y. 10016, (212) 545-5100
Midwest/Southwest
Elaine Purnell, Arlene Sulkin, Marketing & Media Decisions, Suite 804, 203 N. Wabash Ave., Chicago, Ill. 60601, (312) 977-1933
West
Nelda Chambers, Marketing & Media Decisions, 1800 Century Park East, Suite 200, Los Angeles, Calif. 90067, (213) 556-0394

presstime Advisory Committee
Burl Osborne, The Dallas Morning News, Chairman
Ed Johnson, The New York Times Co., Tallahassee, Fla., Vice Chairman
William M. Boyd, Home News Publishing Co., New Brunswick, N.J.
Susan Clark-Jackson, Reno Gazette-Journal
John M. Jones Jr., The Greeneville (Tenn.) Sun
Maxwell E. McCombs, University of Texas Department of Journalism
Jacqui Love Thornell, The Washington Post

presstime
Presstime magazine (ISSN 0194-3243) is published monthly by the American Newspaper Publishers Association, 11600 Sunrise Valley Drive, Reston, Va. 22091. Basic subscription rate of $50 a year is included in members' dues. Non-member rate is $100 domestic, additional overseas. Second-class postage paid at Reston, Va., and additional mailing offices. Copyright 1989 by ANPA. All rights reserved. Unsolicited articles and photos should be sent to the presstime editor. POSTMASTER: Send address changes to presstime, ANPA, Box 17407 Dulles Airport, Washington, D.C. 20041

BPA **Presstime** is a member of the Business Publications Audit of Circulation Inc.

JOA LAW MAY BE AT

The Supreme Court will soon consider a case involving
not expected to affect existing joint operating arrangements,

BY MARY A. ANDERSON
presstime staff writer

Manteca News
Manteca Bulletin

Ed Cicenas, Manteca Bulletin

Manteca Bulletin Publisher Darell Phillips operates in proximity to his semiweekly competitor, The Manteca News, with which his daily seeks a JOA.

In 1969, a U.S. Supreme Court decision that two Tucson dailies had violated antitrust law by merging their non-editorial operations led to enactment of the Newspaper Preservation Act.

Twenty years later, the high court is revisiting the economics of publishing competing newspapers in the same city. It has agreed to determine whether former U.S. Attorney General Edwin M. Meese III properly applied the act when he approved a joint operating arrangement, or JOA, for The Detroit News and the Detroit Free Press.

Oral arguments are scheduled for the 30th of this month, and a decision is expected by early July.

The proposed deal has commanded a high profile, partially because of the magnitude of the corporate players—Gannett Co., owner of the News, and Knight-Ridder Inc., owner of the Free Press—and because longtime critics of JOAs have seized on the case to advocate repeal or amendment of the newspaper preservation law.

Knight-Ridder has staked the life of the Free Press, its largest newspaper, on the outcome. The company has vowed to close the Free Press if the high court denies the JOA.

If the court allows the partial merger to proceed, it would be the first JOA formed since 1983, when the two Seattle dailies began joint operations after more than two years of Justice Department scrutiny and litigation.

Because the Supreme Court case focuses entirely on the Detroit bid, media lawyers and analysts say the decision, no matter what it entails, will not jeopardize any of the 18 JOAs already in existence. No constitutional issue has been raised by the parties opposing the joint operation, according to newspaper and Justice Department attorneys involved in the case.

However, the court's ruling may well set parameters that could affect potential JOA applicants, the lawyers and analysts speculate. They cite analagous situations where there is not a large economic disparity between the newspapers indicating a clear "downward spiral" for one of them, and where an application for a joint operating arrangement could arise in part from price warfare for market dominance.

"The only impact a holding in the Detroit case would have would be prospectively, either because the [act's] standard of 'probable danger of financial failure' is given a new gloss or the procedure [of approving JOAs] may change," says lawyer P. Cameron DeVore of Davis Wright & Jones in Seattle, who has represented newspapers in JOA applications.

The likeliest situation affected by the decision would be one like Detroit's, he says, because the court tends to tailor its decisions narrowly to the facts presented to it. The Detroit JOA application is the first to deviate from the "downward spiral" model of financial failure, he notes.

Within the past 18 months, newspapers in three other communities have applied for the government's permission to combine business operations and divide the profits [**presstime**, Sept. 1989, p. 42]—in Manteca, Calif., York, Pa., and Las Vegas. But observers say none of the three falls into the Detroit pattern.

Membership in the exclusive JOA club is limited to newspapers that compete fully in the same community for readers and advertisers. To qualify for JOA relief, the applicants must prove that one of the papers is in danger of failing financially.

The recent surge in JOA activity seems to belie other developments that have caused various industry observers and government officials to question whether the Newspaper Preservation Act is waning as a savior of competing editorial voices.

A TURNING POINT

the Newspaper Preservation Act. The outcome is
but it may well have an impact on future applications.

The numbers indicate a diminution in the act's impact:

- There are four fewer JOAs today than in 1970, when the law was enacted and 22 joint operations were "grandfathered."
- Of the grandfathered JOAs, only 15 still exist. "Failing" newspapers eventually folded in Miami, St. Louis and Columbus, Ohio, and one JOA paper acquired the other in Franklin-Oil City, Pa. Three other JOAs were dropped from the original list when the government determined that the newspapers in Lincoln, Neb., Madison, Wis., and Bristol, Va.-Tenn., did not meet the criteria for JOA status.
- Industry trends favoring morning and Sunday publication have left several more JOAs in precarious shape, as partners with afternoon publication schedules have been further weakened.
- Just four joint operations have been approved in the 19 years since the law's enactment, and one of them—in Anchorage—was subsequently dissolved by the newspapers. Three remain in effect—in Chattanooga, Cincinnati and Seattle.
- Besides the 18 places where JOAs exist and the four others where they are being sought, only 23 U.S. cities currently have competing dailies, according to ANPA records. This compares with 32 four years ago [**presstime**, Aug. 1985, p. 23]. Moreover, few of the competing dailies are true candidates for JOAs, newspaper analysts say. In some instances, one paper is viewed as too weak to make a JOA attractive; in others, the rivalry is deemed too heated for a coming together.

On the other hand, over the past four years JOA newspapers in six cities have extended their publishing contracts into the next century, records on file at the Justice Department show. Another five contracts will be up for renewal—or expiration—in the 1990s. (See chart, pp. 8-9.)

Also, still unknown is the act's potential for preserving non-dailies in competitive struggles.

The Manteca filing for JOA relief is the first involving a non-daily paper. The Manteca News, a semiweekly with 24,000 circulation, is designated the "failing newspaper" in the effort to team up with the Manteca Bulletin, a daily with 19,500 morning circulation. The Antitrust Division of the Department of Justice has not yet issued a recommendation in the case.

Seattle lawyer DeVore summarizes the situation this way: "Though there have been some deaths of newspapers (published under JOAs), the net result is that since 1970 in 12 to 13 cities we have news and editorial competition for another 20 years or more, and I think that's been a major benefit."

"I guess the act has succeeded in doing what Congress intended it to do, at least in those pre-act cities that were grandfathered," says DeVore.

But even some of the act's most ardent supporters like securities analyst John Morton of Washington, D.C., concede its impact is shrinking.

"Even when the act was passed, there were few (competitive) cities," Morton says. "The list of candidates (for JOAs) has never been very long and it's gotten shorter."

House Judiciary Committee Chairman Jack Brooks (D-Texas) cited the small number of newspapers participating in JOAs when he convened an oversight hearing on the preservation law last summer [**presstime**, Aug. 1989, p. 34]. The House Subcommittee on Economic and Commercial Law, which Brooks also chairs, is considering whether to hold full hearings to explore possible amendments to the act.

Some witnesses before the subcommittee, primarily representatives of unions and non-daily or alternative newspapers that have traditionally opposed the law, called for its outright repeal.

FUTURE ACTIVITY. Among the 23 remaining cities with competing dailies not already in or seeking JOAs, less than half are perceived as potential sites for joint arrangements.

Asked how many more JOAs might be formed, newspaper analyst Morton estimates, "You could probably count them on one hand."

The reason, he says, is that "there's a window of opportunity for a JOA. It's at that time when the second paper still has a large enough portion of the market that it makes it financially attractive for the larger paper to enter a JOA."

Morton says the window has already been shut, for various reasons, in most cities hosting two or more competitive dailies. In most cases, the financial disparity is just too large—the second paper is either losing too much money or is tiny compared to its competitor. In others, such as Chicago or New York City, publishers would likely not be interested in teaming up.

Little Rock, Denver, Houston, Dallas and San Antonio are among the most obvi-

> *Over the past four years JOA newspapers in six cities have extended publishing contracts into the next century, records on file at the Justice Department show. Another five contracts will be up for renewal—or expiration—in the 1990s.*

ous candidates, Morton says. However, the Texas dailies are profitable and, therefore, any JOA bids are probably far into the future, he predicts. Dailies in Trenton, N.J., and Scranton, Pa., also could be JOA candidates, according to Morton.

Denver tops his list because Scripps Howard, owner of the Rocky Mountain News, operates the most JOA newspapers of any group, seven. William Dean Singleton, whose MediaNews Group includes The Denver Post, has pursued and bought several newspapers in potential JOA markets and has applied for his first as owner of The York Dispatch. The Justice Department's Antitrust Division recently recommended approval of the JOA between the Dispatch and the York Daily Record [**presstime**, July 1989, p. 55].

Two other analysts interviewed by **presstime**, Bruce E. Thorp of Philadelphia's Provident National Bank and Kevin R. Gruneich of The First Boston Corp., generally concur with Morton's assessment.

The applications from York, Manteca and Las Vegas suggest that more smaller papers are petitioning for JOA protection than has been true in the past.

Each of the dailies involved in the York and Manteca applications circulates fewer than 50,000 copies. The Las Vegas Sun, designated as the "failing newspaper" in its proposed joint arrangement with the Las Vegas Review-Journal, has a morning circulation of 53,948 [**presstime**, Sept. 1989, p. 42].

Regarding the Manteca petition, Morton says even if it is approved he does not foresee a stream of applications from weeklies and their non-daily or small-daily competitors. "I think that's a trend that's probably going to begin and end with Manteca," he comments.

Historically, non-daily and suburban papers have been among the most vocal opponents of JOAs.

CHANGING CONDITIONS. Morris J. Levin, a Washington, D.C., attorney who represented the Tucson and other newspapers in lobbying for the act 20 years ago, also discounts the possibility that suburban or weekly newspapers will seek JOAs.

"To assume that there will now, or at some time in the future, be a surge in applications under the act is to defy credibility," he told the House Subcommittee on Economic and Commercial Law in its oversight hearing.

The act has worked well, he testified, even though it has been "selectively implemented in a small minority of the cases where there were failing newspapers."

Levin and other observers say that the key to the Newspaper Preservation Act's continued viability is the flexibility the parties have to renegotiate—or terminate—contracts as market conditions fluctuate.

"A JOA pretty clearly is not forever," says analyst Thorp. "What made sense 20 years ago doesn't always make sense now."

Three times over the past four years a dominant JOA partner with the evening slot insisted on taking over the morning cycle.

Two JOA contracts—in Knoxville, Tenn., and Birmingham—were extended on condition that the papers trade publishing schedules. In July 1986 The Knoxville News-Sentinel switched to morning publication and the smaller Knoxville Journal assumed the p.m. position. The Birmingham papers will switch cycles in 1995—the Post-Herald will become the evening paper and the dominant News will begin morning publication.

In the third instance, The Columbus Dispatch—the independently owned, domi-

Who's Who in Joint

City/newspaper	Publication schedule	Circulation (as of March 31, 1989)	Ownership	Year JOA began	Year of renewal or expiration
Albuquerque					
Albuquerque Journal	M	119,400	Independent	1933	2022
	S	154,646			
The Albuquerque Tribune	E	40,636	Scripps Howard		
El Paso					
El Paso Times	M	61,641	Gannett Co.	1936	2015
	S	98,104			
El Paso Herald-Post	E	29,439	Scripps Howard		
Nashville					
The Tennessean	M	126,762	Gannett Co.	1937	2022
	S	258,969			
Nashville Banner	E	63,078	Independent		
Evansville, Ind.					
The Evansville Courier	M	62,888	Scripps Howard	1938	1998
	S	115,626			
The Evansville Press	E	36,475	Independent		
Tucson					
The Arizona Daily Star	M	90,498	Pulitzer Publ. Co.	1940	2015
	S	171,212			
The Tucson Citizen	E	57,247	Gannett Co.		
Tulsa					
Tulsa World	M	126,909	Independent	1941	1996
	S	238,495			
The Tulsa Tribune	E	68,990	Independent		
Fort Wayne, Ind.					
The Journal-Gazette	M	61,777	Independent	1950	2020
	S	137,023			
The News-Sentinel	E	55,675	Knight-Ridder		
Birmingham					
Birmingham Post-Herald	M	63,021	Scripps Howard	1950	2015
The Birmingham News	E	172,510	Newhouse		
	S	209,047			
Salt Lake City					
The Salt Lake Tribune	M	111,356	Independent	1952	2012
	S	141,180			
Deseret News	E	60,682	Independent		
	S	66,988			

Sources: U.S. Department of Justice, ANPA, Audit Bureau of Circulations, JOA newspapers

Operating Arrangements

City/newspaper	Publication schedule	Circulation (as of March 31, 1989)	Ownership	Year JOA began	Year of renewal or expiration
Shreveport, La.					
The Times	M	76,988	Gannett Co.	1953	1994
	S	104,926			
Shreveport Journal	E	19,118	Independent		
Knoxville, Tenn.					
Knoxville Journal	E	42,156	Persis Corp.	1957	2005
The Knoxville News-Sentinel	M	100,353	Scripps Howard		
	S	166,574			
Charleston, W.Va.					
The Charleston Gazette	M	55,456	Independent	1958	2036
Sunday Gazette-Mail	S	105,753			
Charleston Daily Mail	E	50,917	Thomson		
Pittsburgh					
Pittsburgh Post-Gazette	M	166,942	Block Newspapers	1961	1999
The Pittsburgh Press	E	227,434	Scripps Howard		
	S	560,199			
Honolulu					
The Honolulu Advertiser	M	98,025	Persis Corp.	1962	2042
Honolulu Star-Bulletin	E	96,074	Gannett Co.		
Sunday Star-Bulletin & Advertiser	S	203,752			
San Francisco					
San Francisco Chronicle	M	556,196	Chronicle Publ. Co.	1965	1995
San Francisco Examiner	E	135,444	The Hearst Corp.		
San Francisco Examiner and Chronicle	S	700,989			
Cincinnati					
The Cincinnati Enquirer	M	196,883	Gannett Co.	1979	2007
	S	337,413			
The Cincinnati Post	E	109,262	Scripps Howard		
Chattanooga					
The Chattanooga Times	M	47,784	Independent	1980	2000
Chattanooga News-Free Press	E	57,233	Independent		
	S	110,686			
Seattle					
Seattle Post-Intelligencer	M	204,827	The Hearst Corp.	1983	2032
The Seattle Times	E	236,563	Seattle Times Co.		
Times/Post Intelligencer	S	504,993			

nant paper—terminated its JOA because Scripps Howard's Citizen-Journal would not surrender the a.m. position.

Of the five JOAs that expire in the coming decade, only in Pittsburgh does the larger paper still publish in the evening.

As for the inability of the Newspaper Preservation Act to preserve the Citizen-Journal, the St. Louis Globe-Democrat and The Miami News, Thorp observes, "A JOA does not necessarily strengthen the position of the second paper." The joint arrangement "perpetuates its existence, but it can become an increasing burden on the owners," who may eventually allow the weaker paper to die.

Marilyn S. Greenwald, assistant professor of journalism at Ohio University, agrees that the closure of the Citizen-Journal, while lamentable, does not mean the preservation act failed in its historic mission.

"I think (the act) was really needed" 20 years ago, says Greenwald, who worked as a business writer for the C-J for seven years until it closed. But changes in society—particularly factors that favor morning newspaper readership—have rendered application of the law somewhat "outdated," she adds.

In St. Louis, although the act could not sustain the p.m. Globe-Democrat owned by the Newhouse group, daily competition resumed there Sept. 25 when a new tabloid, Ingersoll Publications Co.'s St. Louis Sun, began morning publication opposite the Post-Dispatch.

David Kraslow, former publisher of The Miami News and now a vice president of Cox Newspapers, notes that the act extended the News' life for 22 years through a JOA between Cox, owner of the News, and Knight-Ridder, owner of The Miami Herald. "It's not that they (the JOA participants) didn't give it a good-faith effort to publish an independent newspaper in Miami," he says.

A critical issue there was the growth of the Sunday newspaper market and the News' exclusion from that market under the JOA contract, he says. The News' economic tailspin might have been slowed, he believes, "if there had been some way to preserve that (editorial) voice in a Sunday paper. It would have to be in a combined format," Kraslow says, much like what the papers in San Francisco and Seattle are doing and what the Detroit papers have proposed.

Despite the News' closure last Dec. 31, the Miami JOA technically remains in effect, with Cox sharing in the profits of the Herald until the year 2021. This setup continues to draw critical comments from Newspaper Preservation Act opponents, and the Justice Department is investigating the plan for possible antitrust violations.

On the legislative front, Congress could call further hearings and follow up with some amendments to the act, such as requiring a money-losing newspaper to seek buyers before resorting to a JOA, says ANPA Assistant General Counsel Claudia James. But she sees no sentiment yet for changing or repealing the act.

Harold W. Fuson Jr., general counsel for The Copley Press Inc. and chairman of ANPA's Legal Affairs Committee, says the aspect that most troubles him about the intensified debate over the act is not the dwindling numbers of newspapers it affects but the government's scrutiny of newspaper economics.

The congressional hearings preceding the law's 1970 enactment required "voluminous documentation" about newspaper operations, he recalls. "If it becomes a focus of renewed congressional interest, we're going to go through that process all over again." ☐

7-month consumption is down slightly

Newsprint consumption declined again in July for all U.S. users, although U.S. daily newspapers increased their consumption slightly. All users consumed 953,730 metric tons, a decrease of 1.5 percent from July 1988, according to preliminary estimates.

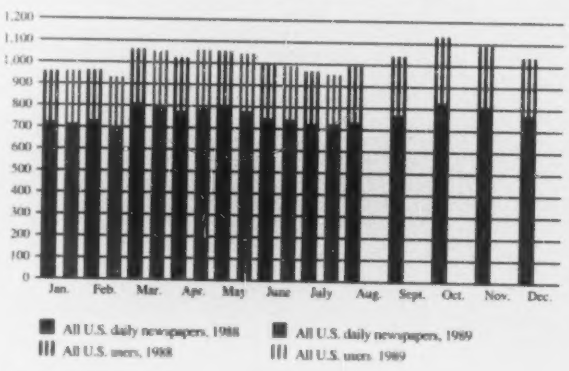
For the first seven months of 1989, overall consumption was down 0.4 percent.

U.S. dailies in July used 722,742 metric tons, 0.1 percent more than a year earlier. However, for the seven-month period their consumption decreased 0.6 percent.

Newsprint inventories for newspapers in ANPA's statistical sample averaged a 41-day supply in July, compared with a 51-day supply in July 1988. Stocks of North American newsprint mills increased about 28.9 percent from July 1988.

Canadian newsprint mills operated at 94 percent of rated capacity in July and at 96 percent for the year to date. U.S. mills operated at 99.2 percent and 96.7 percent of capacity, respectively.

Estimated newsprint consumption, 1988-1989 (thousands of metric tons)



Estimated consumption of all U.S. daily newspapers[1]

Region	**June 1989(r)**	**June 1988**	**% Change**
Northeast	183,660	194,233	-5.4
North Central	160,139	160,293	-0.1
South	232,674	221,335	+ 5.1
West	171,041	171,732	-0.4
Circulation Size			
up to 25,000	55,249	53,856	+ 2.6
25,001-100,000	163,805	161,284	+ 1.6
Over 100,000	528,460	532,453	-0.7
June totals	747,514	747,593	-0.01
Six-month totals	4,545,711	4,577,050	-0.7
Region	**July 1989(p)**	**July 1988**	**% Change**
Northeast	169,614	179,089	-5.3
North Central	152,600	150,917	+ 1.1
South	229,752	224,714	+ 2.2
West	170,776	166,948	+ 2.3
Circulation Size			
up to 25,000	52,619	51,519	+ 2.1
25,001-100,000	160,795	159,925	+ 0.5
Over 100,000	509,328	510,224	-0.2
July totals	722,742	721,668	+ 0.1
Seven-month totals	5,268,453	5,298,718	-0.6

Estimated consumption of all U.S. users

	1989	**1988**	**% Change**
May totals	1,043,694(r)	1,058,414	-1.4(r)
June totals	994,912(r)	997,085	-0.2(r)
July totals	953,730(p)	967,960	-1.5(p)
Seven-month totals	6,998,499(p)	7,027,699	-0.4(p)

Production

	Canada	**U.S.A.**	**North America**
July 1989	813,669	473,905	1,287,574
July 1988	826,805	435,891	1,262,696
Increase or decrease	-13,136 -1.6%	38,014 + 8.7%	24,878 + 2.0%
Seven months 1989	5,699,389	3,164,202	8,863,591
Seven months 1988	5,822,260	3,146,918	8,969,178
Increase or decrease	-122,871 -2.1%	+ 17,284 + 0.5%	-105,587 -1.2%

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
July 1989	549,040	86,964	138,674	774,678
July 1988	573,690	99,182	121,344	794,216
Seven months 1989	3,909,887	667,485	961,205	5,538,577
Seven months 1988	4,093,037	707,713	867,424	5,668,174
Increase or decrease	-183,150 - 4.5%	-40,228 -5.7%	+ 93,781 + 10.8%	-129,597 -2.3%
From U.S. mills				
July 1989	410,562		61,744	472,306
July 1988	390,443		40,274	430,717
Seven months 1989	2,833,222		305,012	3,138,234
Seven months 1988	2,926,476		192,030	3,118,506
Increase or decrease	-93,254 -3.2%		+ 112,982 + 58.8%	+ 19,728 + 0.6
From North American mills				
July 1989	959,602	86,964	200,418	1,246,984
July 1988	964,133	99,182	161,618	1,224,933
Seven months 1989	6,743,109	667,485	1,266,217	8,676,811
Seven months 1988	7,019,513	707,713	1,059,454	8,786,680
Increase or decrease	-276,404 -3.9%	-40,228 -5.7%	+ 206,763 + 19.5%	-109,869 -1.3%

Stocks

U.S. publishers[2]	**Tonnage**	**Days' supply on hand**	**Days' supply in transit**
May 1989	837,457	36	5
May 1988	951,494	40	6
June 1989	829,151	38(r)	5
June 1988	989,453	45	7
July 1989	826,944	37(p)	4(p)
July 1988	972,566	45	6
Canadian mills			
July 1989	451,300	—	—
July 1988	343,181	—	—
U.S. mills			
July 1989	74,061	—	—
July 1988	64,543	—	—

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary